

Designing the Blue-Water Shield

How India's maritime security is being built to meet the Indo-Pacific threats of 2026–2037

An assessment of doctrine, force structure, shipbuilding and strategy against China's growth and US influence: 14 chapters, 18 figures, 30 pages, evidence graded and sourced.

DELTA DOCTRINES

October 2026 | Open-source analysis. Reported figures are sourced; scores and projections are analyst judgement. Not intelligence reporting. Contains no classified material.

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How to read this paper

This paper is written for senior readers who need the argument first and the evidence second. Each chapter opens with a judgement, then supports it with figures and tables. Where a number comes from a public source it carries a tag such as [S2], resolved in the register on page 30. Where a chart or score reflects the analyst's own reading, the caption says so. Nothing here is classified, and nothing is presented as an official Indian position unless a source says so.

Evidence conventions

Label	Meaning	Examples in this paper
Reported	A figure published by a government body, a think-tank brief or a named outlet at the date shown	Budget lines, fleet counts, contract values
Stated target	An objective announced by the Navy or Government; not a forecast of delivery	200+ ships by 2035; 230 by 2037
Delta Doctrines judgement	An ordinal score or projection from the analyst; no measured data behind it	Figures 12, 13 and 18
Unverified	A claim seen in one secondary outlet only; used with caution and flagged in the text	Navy allocation of Rs 1,07,549 crore [S15]

Glossary of terms used

Term	Meaning
AoN	Acceptance of Necessity: first formal approval of a procurement programme; not a contract
CCS	Cabinet Committee on Security: the body that sanctions major contracts
NWNP	'No War, No Peace': IMD-25's category for competition below open conflict
SSBN / SSN / SSK	Nuclear ballistic-missile submarine / nuclear attack submarine / conventional submarine
IMD-25 / INMSS-2026	Indian Maritime Doctrine 2025 / Indian Navy Maritime Security Strategy, April 2026

CHAPTER 1 | EXECUTIVE SUMMARY

India is designing a sea-denial navy for a contested Indo-Pacific

India's maritime security is being redesigned around one strategic problem: how to keep the Indian Ocean from becoming a contested rear area while great-power competition concentrates in the Western Pacific. The answer taking shape in 2025–26 is neither a bid for parity with the Chinese navy nor an alignment with the United States. It is a layered system of **sea denial** in the waters that matter most, **partnered presence** beyond them, and an industrial base able to sustain both. Four documents and decisions define the design: the Indian Maritime Doctrine 2025, released on 2 December 2025 [S3]; the Indian Navy Maritime Security Strategy, April 2026 [S4]; a 2026–27 defence budget of Rs 7,84,678 crore, up 15.2%, with capital outlay up 21.8% [S1]; and a fleet-growth ambition from about 140 warships today to over 200 by 2035 and up to 230 by 2037 [S2].

Six findings

- **The threat is accumulation, not a fleet battle.** The realistic Indian Ocean contest to 2035 is the slow build-up of Chinese presence: research and survey vessels, submarines, dual-use ports and logistics sites, with a latent ability to interdict. The CSIS review cited in open reporting found that most of 64 Chinese research vessels showed indicators of military-linked activity, and more than a dozen worked in Indian Ocean waters [S6].
- **Parity is neither sought nor needed.** The PLAN battle force passed 370 ships against about 140 Indian warships [S5][S2]. Counting rules differ, but the order of magnitude is not in doubt. India's design aims instead to deny an adversary the freedom to operate in the Indian Ocean at acceptable cost.
- **The binding constraint is conversion, not ambition.** Approved but uncontracted hulls rose from 31 to 75 between December 2024 and May 2026 while hulls under construction fell from 64 to 45 [S2]. Navy modernisation heads grew about 4% in 2026–27 against 24.6% for acquisition overall [S1].
- **The subsurface programmes decide the outcome.** India has three ballistic-missile submarines, 16 diesel-electric boats and no nuclear attack submarine in service [S2][S11]. The six-boat P-75I programme, about Rs 70,000 crore, awaited Cabinet Committee on Security approval as of mid-August 2026 [S9].
- **Balance with the United States is functional, not structural.** India converges with Washington on intelligence, exercises and platforms, and signed a ten-year defence framework on 31 October 2025 [S12], but keeps its distance on alliance structure, trade alignment and its Russia and Gulf relationships (Figure 18).
- **The carrier question is being settled by budget logic.** The Navy now presents the second indigenous carrier as a replacement for INS Vikramaditya, not a third carrier, after government preference for submarines [S10].

BOTTOM LINE

India is building the right navy for the Indian Ocean and an incomplete one for the Indo-Pacific. The 2026–2030 window will show whether approvals become hulls: P-75I, the nuclear attack submarines, mine countermeasure vessels and the second carrier are the four tests.

Paper at a glance: the numbers that anchor the argument

Indicator	Value	Date	Source
Warships and submarines in service	About 140	May 2026	[S2]
Ships and submarines under construction	45 (was 64 in Dec 2024)	May 2026	[S2]
Approved (AoN), not yet contracted	75 (was 31 in Dec 2024)	May 2026	[S2]
Fleet target	150–160 by 2030; 200+ by 2035; up to 230 by 2037	Navy-stated	[S2]
Ministry of Defence budget 2026–27 (BE)	Rs 7,84,678 crore (+15.2%); 2.0% of GDP	Feb 2026	[S1]
Capital outlay on defence services	Rs 2,19,306 crore (+21.8%)	Feb 2026	[S1]
Navy capital heads (fleet, dockyard, joint staff)	Rs 32,496 crore (+4%); 17.5% of acquisition	Feb 2026	[S1]
Domestic share of modernisation budget	75% (40% in 2020–21)	Feb 2026	[S1]
Commercial shipbuilding package	Rs 69,725 crore	Jul 2026	[S8]
PLAN battle force (current / 2030)	Over 370 / 435 (US DoD)	2025	[S5]
Seaborne share of India's trade by volume	Over 90%	Recent	[S7]

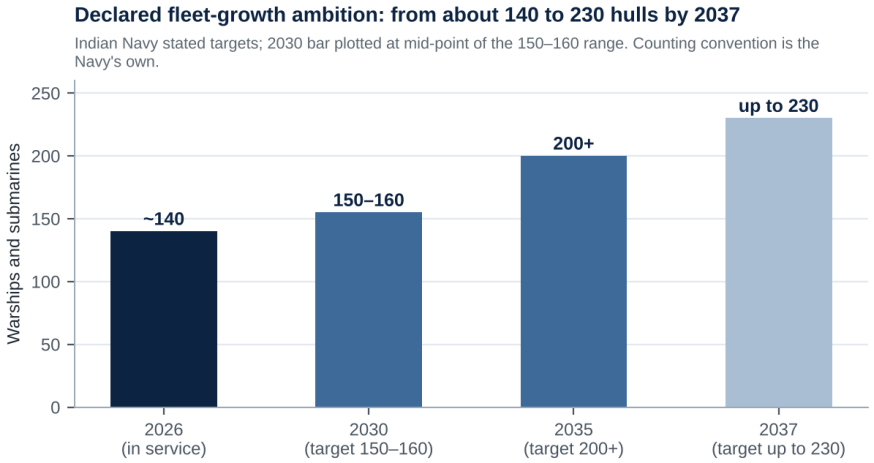


Figure 1. Stated fleet-growth targets against the 2026 baseline. The 2030 bar is plotted at the mid-point of the 150–160 range. [S2]

Ten priorities for 2026–2030

#	Priority	Test of success by 2030
1	Sign and begin P-75I; approve the SSN programme	First P-75I keel laid; SSN design freeze
2	Close the mine countermeasure gap (12 MCMV approved July 2025)	Contract signed; first hull launched
3	Convert 75 approved hulls to contracts	Approved-uncontracted count below 40
4	Settle the carrier plan (IAC-2) and its air wing	CCS sanction; Rafale-M in squadron service
5	Stand up the Maritime Theatre Command or its equivalent	Joint command with a named commander and budget
6	Fund underwater and seabed domain awareness	Persistent sensor coverage of Malacca approaches and Andaman Sea
7	Lift Navy capital growth to match acquisition growth	Navy share of acquisition restored toward 21%
8	Deepen access arrangements across the western and eastern ocean	Agreed logistics access at three or more new sites
9	Protect undersea cables and offshore energy assets	Published protection regime and patrol pattern
10	Keep US cooperation operational without alliance obligations	Co-production milestones met; no basing commitments

WHAT WOULD CHANGE THIS ASSESSMENT

Three developments would move the conclusions. A CCS decision on P-75I and Project 77 in late 2026 would bring the subsurface timeline forward. A sharp rise in contract signings for the 75 approved hulls would validate the 200-ship target. A durable US–India trade settlement would reduce the main non-military risk to platform supply. The opposite outcome on each would widen the gap between ambition and capability described in Chapters 6 and 9.

CHAPTER 2 | CURRENT CHALLENGES AND PROJECTED THREATS

A trading nation exposed at three chokepoints

India's maritime problem begins with geography and economics rather than with any single adversary. More than 90% of its trade by volume and more than 85% of its crude oil imports move by sea [S7]. Crude import dependence has risen from roughly 30–35% in the 1970s and 1980s to above 85% by the early 2020s, and liquefied natural gas supplies about half of domestic gas consumption [S7]. The Strait of Hormuz carries around 80–85% of India's crude imports; the Red Sea–Suez corridor carries 30–35% of its merchandise exports, including 35–40% of textiles and apparel and 30–35% of pharmaceuticals [S7]. A navy that defends such an economy is judged by the continuity of flows, not by the number of battles it could win.

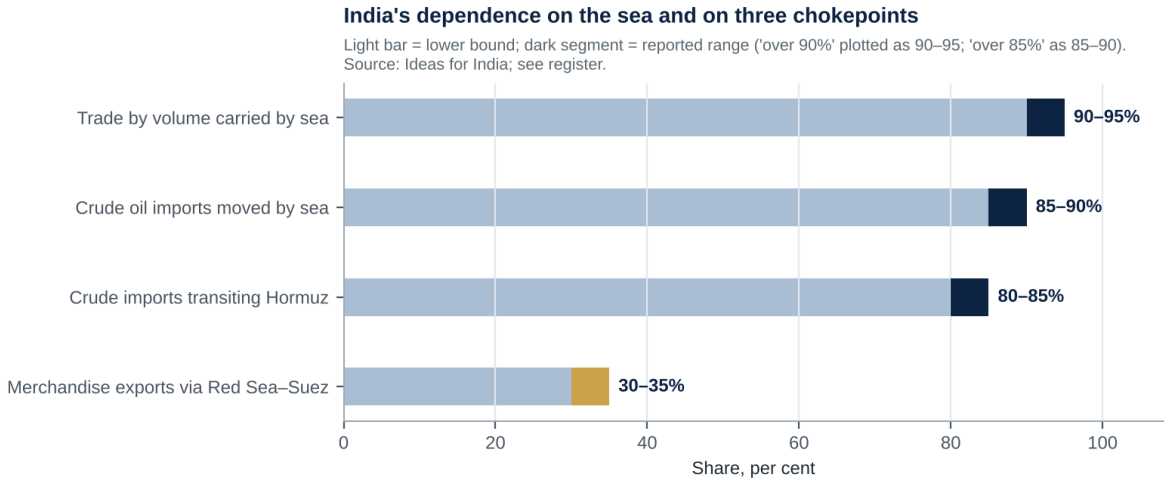


Figure 4. Share of India's trade and energy exposed to the sea and to individual chokepoints. [S7]

Four current challenges

1. Chokepoint volatility. The Red Sea crisis showed how quickly a distant disruption reaches Indian ports. Rerouting around the Cape of Good Hope raises transit time by about 30%, freight by 40–60% and insurance by 15–20%, with delays of up to 20 days in some cases [S7]. The 1990–91 Gulf War, when foreign-exchange reserves fell to about two weeks of imports, remains the historical reference for what a prolonged energy shock can do [S7].

2. Grey-zone pressure. The Chief of the Naval Staff described the seas as 'the front line of grey zone activities' in August 2025 and warned that seemingly innocuous fishing vessels could carry out major offensive actions [S13]. IMD-25 formalises the 'No War, No Peace' condition as an operational category, and INMSS-2026 adds a sub-conventional tier of deterrence [S3][S4].

3. Expanding Chinese presence. Chinese warships have operated in the Indian Ocean since the 2008 anti-piracy deployments, and China opened its Djibouti base in 2017 at a reported cost of about $590 million [S6]. Chapter 3 treats this in detail.

4. Terrorism from the sea. INMSS-2026 names terrorism among its threat categories and states a capacity to retaliate against non-state actors and their state sponsors, while noting that India's nuclear posture does not constrain its response [S4].

> ANALYST JUDGEMENT
> India's exposure is asymmetric. The country can survive a lost naval engagement far better than a four-week closure of Hormuz. That asymmetry explains why the Navy's declared mission has moved from 'net security provider' toward 'preferred security partner' and 'first responder': it is a mission about continuity of flows and crisis response, not about command of the sea [S3].

Projected threats to 2035

Delta Doctrines assesses eight threat families over the decade. They are ranked by combined likelihood and impact in Figure 13. Two rise above the rest: a sustained Chinese subsurface and survey presence in the Indian Ocean, and disruption at the Hormuz and Red Sea chokepoints. Great-power war in the Western Pacific is judged low in likelihood but highest in impact, because it would cut Indian trade with East Asia and test the credibility of partnerships in the same week.

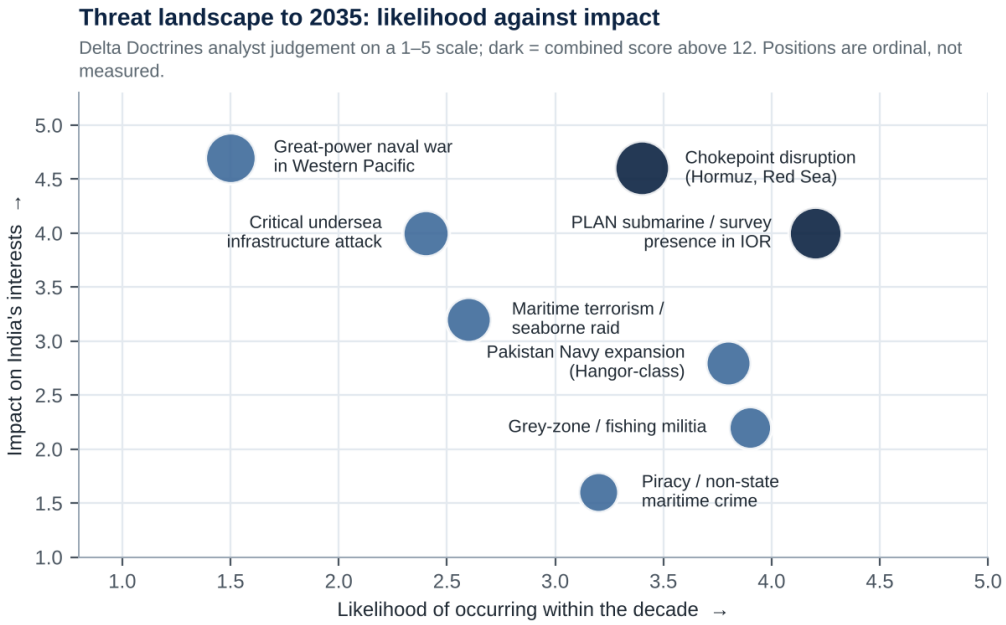


Figure 13. Threat landscape to 2035. Analyst judgement on a 1–5 scale; dark bubbles have a combined score above 12.

Threat family	Mechanism	Indicator to watch	Principal Indian response
PLAN and survey presence	Persistent submarine and survey operations; port access at Gwadar, Hambantota, Kyaukpyu	Survey ships near the Nicobar Islands; submarine port calls	P-8I and MQ-9B surveillance; SSN and P-75I
Chokepoint disruption	Houthi-type attacks, Gulf conflict, mining	Insurance premia; diversion volumes	Escort deployments; MCMV programme; stocks
Undersea infrastructure attack	Cable cutting, sabotage by deniable platforms	Unexplained cable faults	Underwater domain awareness; seabed sensors
Maritime terrorism	Seaborne raid in the 26/11 pattern	Fishing-boat anomalies; AIS gaps	Coastal radar chain; NGMV; Coast Guard
Pakistan fleet growth	First of eight Chinese-built Hangor submarines commissioned April 2026 [S6]	Boat deliveries; patrol patterns	ASW craft; P-75I; carrier battle group
Grey-zone activity	Fishing militia, civilian vessels used for surveillance	Vessel behaviour near offshore assets	MDA fusion; Coast Guard rules of engagement
Western Pacific war	Taiwan or South China Sea escalation	US and PLAN deployments	Hedging; partnered access; trade resilience
Piracy and crime	Somali and Gulf of Aden criminal networks	Incident counts	Routine patrols; Information Fusion Centre

Why the technology curve matters

INMSS-2026 lists disruption from artificial intelligence, autonomy and robotics as a distinct threat, and extends maritime domain awareness to underwater, seabed and near-space domains [S4]. The practical consequence is that the threat surface widens faster than the fleet. A mine, a seabed sensor or a drone boat is cheap to place and expensive to find. That cost asymmetry favours the side that can contest the sea cheaply, which in the Indian Ocean is currently the intruder, not the defender.

CHAPTER 3 | CHINA'S GROWTH AND US INFLUENCE

China: scale, momentum and a growing Indian Ocean foothold

China's naval build-up is the largest in peacetime history and sets the scale against which Indian planning must be read. The US Office of Naval Intelligence series reproduced by the Congressional Research Service puts the PLAN battle force at 255 ships in 2015, 360 in 2020 and about 400 by 2025, against 296 for the US Navy in 2024; the US Department of Defense reports 'over 370' ships now and 435 by 2030 [S5]. The two series differ in counting rules but agree on direction.

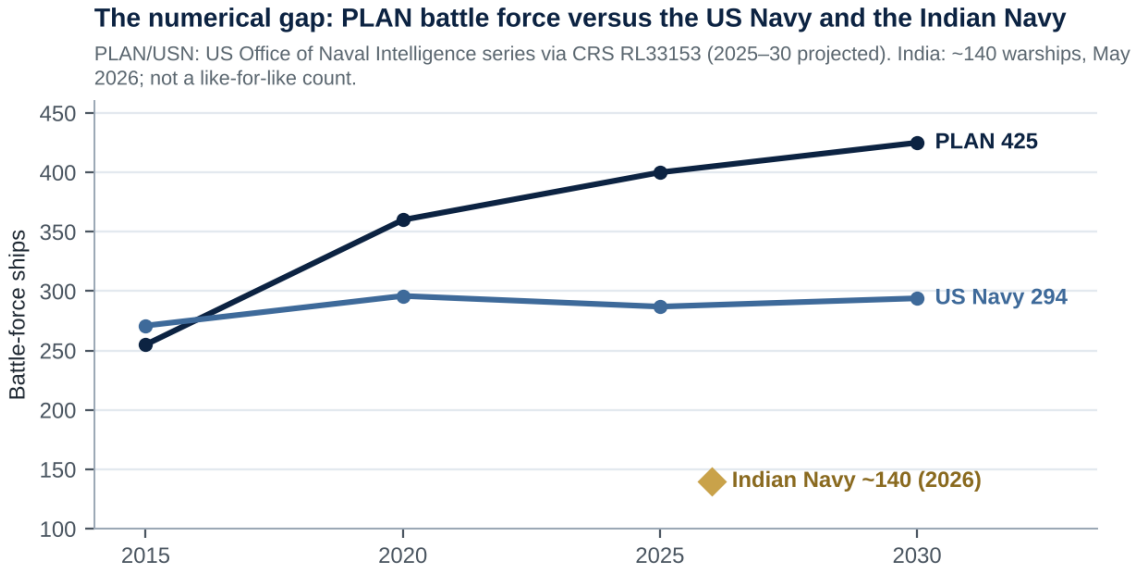


Figure 2. PLAN and US Navy battle-force ships, with the Indian Navy's 2026 warship count for scale. PLAN and USN series: ONI via CRS; India is not a like-for-like count. [S5][S2]

Carriers and the second-generation fleet

China commissioned Fujian, its first catapult-equipped carrier, at Sanya on 5 November 2025. CSIS satellite imagery from May 2026 shows a fourth carrier hull of about 286 metres at Dalian with strong indications of nuclear propulsion, and the Pentagon expects nine Chinese carriers by 2035 [S6]. China is also fielding large amphibious assault ships and a replenishment force that includes an oiler larger than any in the US Navy [S6]. Replenishment ships matter for India more than carriers: they are what turns a regional navy into one able to stay on station in the Indian Ocean.

What the numbers mean for India

Three implications follow. First, China will not need to deploy most of its fleet to the Indian Ocean to outnumber India locally; it needs to detach only a small fraction. Second, the distance from Chinese ports to the Indian Ocean, about the length of the Malacca route, remains China's structural weakness, which is why access agreements and the Andaman and Nicobar approaches matter more than any single ship count. Third, the numerical gap is widest in surface combatants and narrowest in the quantity India can credibly use for denial: submarines, long-range maritime patrol aircraft and shore-based missiles.

> ANALYST JUDGEMENT
> Counting ships understates India's position at its own coast and overstates it in the Western Pacific. The relevant contest is local: how many Chinese platforms can be sustained, for how long, at what distance from home. India should measure itself against that figure, not against the PLAN total.

Submarines and the footprint in the Indian Ocean

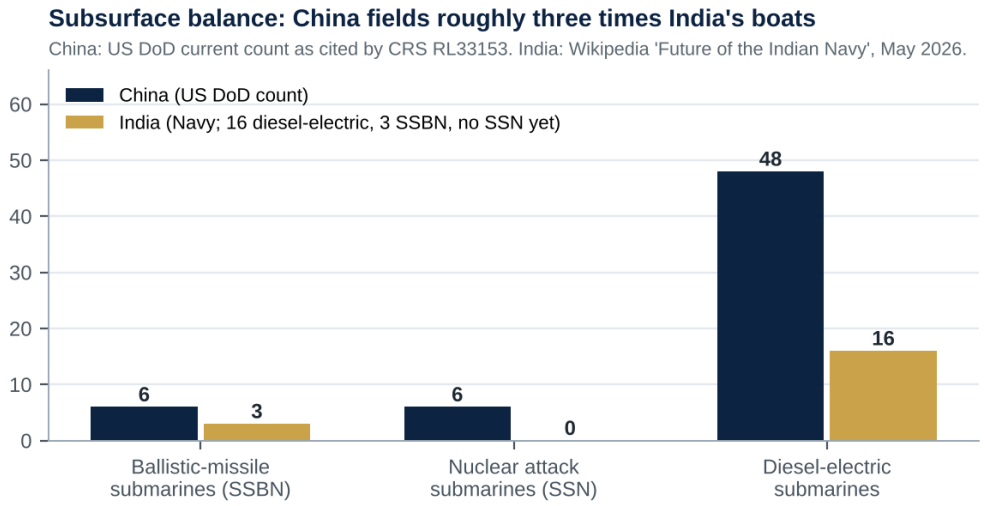


Figure 3. Submarine inventories. China: US Department of Defense current count via CRS [S5]. India: Navy inventory, May 2026 [S2].

China fields about 60 submarines on the DoD count (6 SSBN, 6 SSN, 48 diesel), with a target of 65 by 2025 and 80 by 2035 [S5]. India has 3 SSBN and 16 diesel-electric boats and no SSN in service [S2][S11]. ONI projects Chinese SSN numbers rising from 7 in 2020 to 13 by 2030 [S5]. Only a fraction would be present in the Indian Ocean at any time, but each one that is present complicates Indian carrier and convoy operations.

China's access nodes

Node	Type	Why it matters to India	Basis
Djibouti	Military support base (opened 2017, about $590 million)	Gulf of Aden and Red Sea logistics; the only formal Chinese overseas base in the region	[S6]
Gwadar (Pakistan)	Commercial port, dual-use potential	Arabian Sea access beside the Strait of Hormuz approaches	[S6]
Hambantota (Sri Lanka)	Commercial port under Chinese-linked lease	Position on the main east-west shipping lane south of India	[S6]
Kyaukpyu (Myanmar)	Commercial port, dual-use potential	Bay of Bengal access, bypassing Malacca for Chinese energy	[S6]
Ream (Cambodia)	Joint logistics and training centre in development (Pentagon, Dec 2025)	Gulf of Thailand; eastern anchor of the Malacca approach	[S6]
Survey and research vessels	64 vessels reviewed by CSIS; most with military-linked indicators; over a dozen in the Indian Ocean	Seabed and hydrographic data usable for submarine operations	[S6]

A Chinese survey ship was reported mapping the seabed south of the Nicobar Islands for weeks and was tracked by an Indian P-8I [S6]. Pakistan commissioned the first of eight Chinese-built Hangor-class submarines in April 2026 [S6], giving China a partner navy with a modern subsurface capability on India's western flank. The access nodes are labelled 'dual-use' in open sources because no public evidence shows a Chinese military base at Gwadar, Hambantota or Kyaukpyu; the concern is the option, not an announced deployment.

The China–Pakistan naval axis

China's Indian Ocean approach works partly through partners. Pakistan's eight Hangor-class boats, the first commissioned in April 2026 [S6], are Chinese-built and give Islamabad a modern conventional submarine force in the Arabian Sea. For Indian planners this changes the western theatre: ASW assets that would have gone east must stay west, and the same P-8I and MH-60R fleet is asked to cover two sub-surface problems at once. The effect is to stretch Indian resources across both coasts, which is the cheapest way for China to impose cost on India without deploying its own fleet.

The United States: partner, competitor for influence, and a source of uncertainty

The United States is not a threat to India in the sense China is. It is a source of three distinct pressures that a navy designer must account for: dependence on US platforms and components, the pull of alignment in a Western Pacific crisis, and policy volatility in Washington. The relevant US command is the Indo-Pacific Command, which in recent years has expanded exercises and information-sharing with the Indian Navy, and held its 22nd Military Cooperation Group meeting with India [S17]. On 31 October 2025 Defence Minister Rajnath Singh and US Secretary of War Pete Hegseth signed a ten-year framework providing policy direction for exercises, technology collaboration and industrial partnerships [S12].

Pressure	How it shows up	Evidence	Risk to Indian autonomy
Platform dependence	P-8I patrol aircraft (12 in service, 6 more awaiting approval), MH-60R helicopters (22 of 24 delivered), MQ-9B drones	[S2][S14]	Spares, software and end-use conditions sit with the supplier
Alignment pull	Pressure to take sides in a Taiwan or South China Sea contingency; Quad and Malabar visibility	Public record	Entrapment in a conflict not of India's choosing
Policy volatility	Trade tensions between Washington and New Delhi reported through May 2026; trade deal described as nearing completion	[S16]	Defence ties hostage to non-defence disputes
Indian Ocean basing	US facility at Diego Garcia and Gulf presence; India has no equivalent forward weight	Public record	India depends on US strength for Indian Ocean order it cannot supply alone

The structure of influence

US influence on India's maritime design runs through four channels: technology (engines, sensors, aircraft), information (maritime domain awareness data and intelligence), operations (Malabar, bilateral exercises, logistics access) and markets (tariffs and sanctions). The channels do not move together. Operational and informational convergence has grown steadily; the market channel has been the most volatile. The practical risk is not an American attempt to direct Indian naval policy. It is that India's options narrow if its ability to produce its own engines, sensors and submarines does not mature on time.

> ANALYST JUDGEMENT
>
> India's concern with US influence is mostly about leverage and timing, not intent. Washington's interests in the Indian Ocean overlap with India's, but the overlap is conditional on US priorities in the Western Pacific, and US attention can shift faster than an Indian shipyard can respond. The design answer is redundancy of suppliers and indigenous depth, not distance from the United States.

China and the United States compared as maritime pressures on India

Dimension	China	United States
Nature of relationship	Strategic competitor; unresolved land border	Partner with divergent interests
Naval scale	Over 370 ships; 435 projected by 2030 [S5]	296 battle-force ships in 2024; flat to 2030 [S5]
Indian Ocean position	Djibouti base; dual-use access nodes; survey fleet [S6]	Diego Garcia and Gulf facilities; no Indian-facing base
Principal leverage over India	Presence and proximity; Pakistan partnership	Technology, markets and platform dependence
Time horizon of the pressure	Cumulative; builds every year	Episodic; follows policy cycles
Indian response	Deny and deter	Hedge and diversify

CHAPTER 4 | ADDRESSING CHINA'S GROWTH

How India will address China in the Indo-Pacific: layered denial

India's response to Chinese growth is best understood as a three-layer system rather than a single fleet plan. The inner layer defends the homeland, the exclusive economic zone and the ports; the middle layer controls the chokepoint approaches and the island chain that anchors them; the outer layer extends Indian presence through partners, access and exercises. The structure matches the way IMD-25 reframes India's maritime interests, as a sequence running from India to the Indian Ocean Region to the wider Indo-Pacific [S3].



Figure 17. The three-layer denial design. Delta Doctrines synthesis of the 2025 doctrine, 2026 strategy and public deployments. [S3][S4]

The middle layer carries the weight

The middle layer is where India has the largest advantage and the clearest plan. The Andaman and Nicobar Islands sit at the western mouth of the Malacca Strait, where much of China's energy and trade must pass. India's approach is to use that position to make Chinese presence costly and visible, through surveillance by P-8I aircraft and leased MQ-9B drones, submarine patrols and a dense information-fusion picture, rather than to close the strait. The Navy's first Next Generation Missile Vessel had its keel laid at Cochin Shipyard on 20 September 2026 and the first Fleet Support Ship, Surya, was launched on 6 October 2026 [S14]; the second item is directly relevant because replenishment ships extend the time Indian ships can remain forward.

The logic of sea denial

Sea denial is cheaper than sea control. Submarines, mines, long-range missiles and maritime patrol aircraft raise an adversary's cost of entry without requiring India to match the adversary's surface fleet. The Government's reported preference for submarines over a third carrier is consistent with this logic [S10]. The weakness of the denial approach is that it needs undersea sensing and mine countermeasures to work in both directions: India must see what enters its waters and keep its own approaches clear, areas where Chapter 6 finds material gaps.

Instruments of the response

Instrument	What India is doing	Status / evidence	Effect on China's options
Surveillance	P-8I (12 in service, 6 awaiting approval); MQ-9B leased (2 in service; two more leased Aug 2026 for 30 months); 15 on order	[S2][S14]	Raises the detection probability of survey ships and submarines
Undersea force	Three SSBN; P-75I (6 boats, about Rs 70,000 crore); Project 77 SSN (2 approved Oct 2024)	[S2][S9][S11]	Complicates PLAN submarine entry; deterrent at sea
Surface force	Nilgiri-class frigates (Dunagiri commissioned 21 Jun 2026); P-17B and P-15C follow-on	[S2][S14]	Expands escort and patrol capacity
Mine warfare	12 MCMV (AoN 3 July 2025); L&T and Exail offer unmanned mine warfare (May 2026)	[S2][S14]	Protects approaches; threatens opponent's access
Island chain	Andaman and Nicobar Command; shore-based surveillance; Agalega and other access	Public record	Forward depth and early warning
Partners	Malabar, Varuna (with France, Toulon, Sep 2026), 65 foreign navies at the Feb 2026 fleet review	[S6][S14]	Normalises a coalition of presence around the ocean
Doctrine	IMD-25; INMSS-2026; deterrence in three tiers	[S3][S4]	Signals resolve; sets planning categories

What China is likely to do in response

China's most probable counter is not escalation but substitution: more survey ships, more submarine port calls, more support through partners such as Pakistan, and diplomatic pressure on coastal states to withhold access from both India and its partners. The CSIS finding that research vessels carry military-linked indicators shows that substitution is already under way [S6]. India's counter-move is a data contest: if India sees and publishes more of what it observes, grey-zone presence loses its deniability.

Where India is strong and weak

India is strong at the geographic anchor, in its partnerships and in its ability to field maritime patrol aircraft, a capability few navies in the region match at the same density. It is weak in persistent undersea sensing, in mine countermeasures and in the speed of procurement. The Navy states openly that it receives a new vessel about every six weeks from 2026 [S2], and 19 commissionings were planned for the year; that pace is real but still short of what the 2035 target requires. Reaching 200 ships from 140 in nine years means adding about 7 net hulls per year after accounting for retirements.

> ANALYST JUDGEMENT
> India's answer to China is credible in the places and domains where India chooses to fight: near its own coast, at the western mouth of Malacca and under the water. It is not credible at range in the Western Pacific. The strategy is therefore a denial strategy with a deterrence message, not a power-projection strategy.

Milestones that will show whether the response is on track

Date	Milestone	Why it matters	Source
Aug–Sep 2026	First Rafale-M delivery expected (not confirmed at time of writing)	Starts replacement of MiG-29K on carriers	[S2]
Mar 2027	First NGMV deliveries scheduled	Chokepoint and coastal missile craft	[S2]
2027	S4 SSBN expected in service	Fourth deterrent boat	[S11]
2028	Chakra III leased SSN delayed to this year	Training bridge to SSN force	[S2]
2029	MQ-9B purchased aircraft begin delivery	Persistent surveillance expands	[S2]
2030	Rafale-M deliveries complete; P-15C construction begins	Carrier air wing and destroyer renewal	[S2]

CHAPTER 5 | BALANCING THE UNITED STATES

How India balances US influence: convergence where it pays, distance where it counts

India's approach to the United States is selective convergence. It deepens cooperation in the domains where cooperation raises Indian capability and keeps distance in the domains where it would limit Indian choice. Figure 18 scores that pattern across eight areas. The highest convergence is in intelligence and maritime domain awareness, exercises and platform acquisition; the lowest is in command integration and alliance structure.

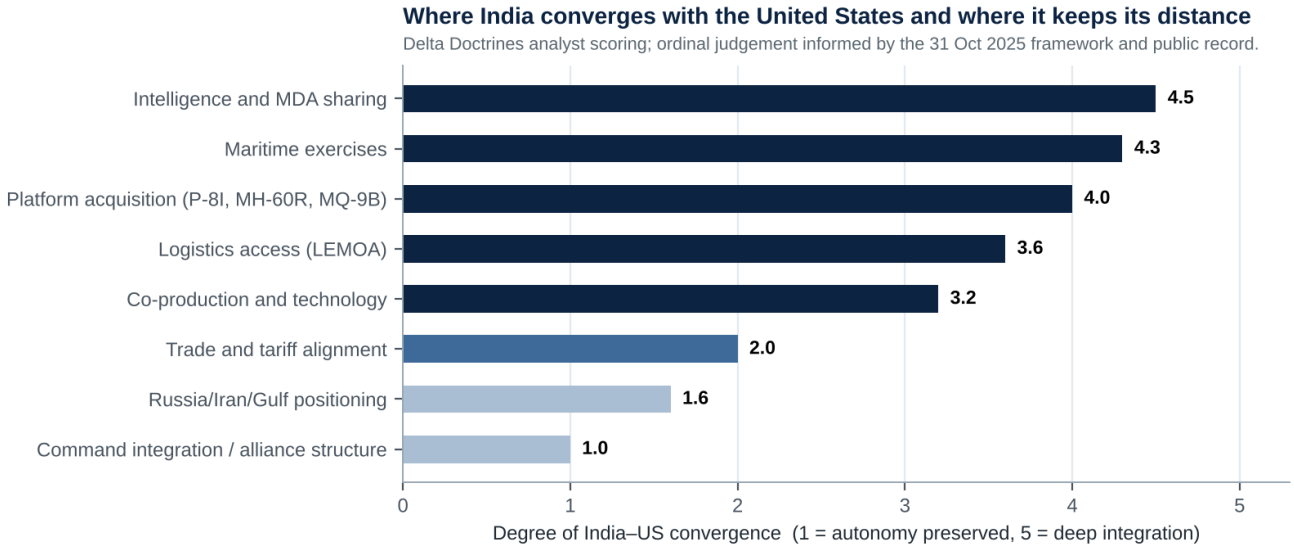


Figure 18. Degree of India–US maritime convergence by domain. Delta Doctrines scoring; ordinal judgement. Not measured data.

Three balancing mechanisms

Diversified suppliers. India buys French Rafale-M carrier fighters (26 on order, deliveries due by 2030 [S2]), German-designed P-75I submarines [S9], American P-8I, MH-60R and MQ-9B systems, and a growing domestic share of production, now 75% of the modernisation budget [S1]. No single supplier controls more than one critical layer of the Navy, which is the practical meaning of strategic autonomy at sea.

Doctrinal independence. IMD-25 replaces 'net security provider' with 'preferred security partner' and 'first responder' [S3]. The language signals that India wants influence through consent and responsiveness, not through the kind of security-provider role that Washington historically played. The doctrine does not mention a US alliance, and INMSS-2026 does not name specific partners [S3][S4].

Multi-alignment. India exercises with the United States, Japan and Australia in Malabar, with France in Varuna, and with 65 foreign navies in the February 2026 fleet review [S6][S14]. The breadth dilutes the weight of any one relationship while keeping each useful.

The 2025 framework in context

The ten-year framework signed on 31 October 2025 at the ADMM-Plus meeting in Kuala Lumpur is a policy document, not a treaty. Open reporting records the signatories, the ten-year duration and the commitment to exercises, technology collaboration and industrial partnership; it records no basing commitments, no new maritime items and no budgets [S12]. That restraint is the point: the framework gives continuity across political cycles without creating obligations that would pull India into a contingency.

Domain	India's posture	What India keeps	What India gives
Intelligence and MDA	Deepen	Control over how data is shared and fused	Access to Indian ocean pictures for partners
Exercises	Deepen	Choice of partners and scenarios	Visible interoperability
Platforms	Buy selectively	Local assembly; alternative suppliers	Large, recurring orders
Logistics access	Reciprocal, case-by-case	No permanent foreign basing	Port calls and supplies for US ships
Co-production	Seek	Indigenous design authority	Market access
Command structure	Refuse integration	Independent chain of command	Nothing beyond coordination
Third-country policy	Maintain own line	Russia, Iran and Gulf relationships	Explanations, not alignment

Scenarios that test the balance

Scenario A: a Western Pacific crisis. The United States asks for Indian help to monitor or control Chinese shipping through the Malacca approaches. India's likely response is to increase surveillance and publish what it sees while declining to blockade. The balance holds if India can show it is acting in its own interest and not at American request.

Scenario B: a tariff or sanctions shock. Trade friction, which Washington and New Delhi have been working to resolve through 2026 [S16], spills into defence cooperation. India's mitigation is already in place: French and domestic suppliers, and a 75% domestic procurement share [S1].

Scenario C: US withdrawal from the Indian Ocean. Gulf or Western Pacific priorities pull US forces away. India's mitigation is the denial layer in Chapter 4 and the partner network in Figure 17; the risk is that these are unfinished.

> ANALYST JUDGEMENT
> India's balance with the United States is stable as long as India can say no on structure and yes on substance. It becomes unstable if India's own production lags and it needs a US-made platform at a moment when Washington has a reason to withhold it. Industrial depth is therefore the quiet foundation of strategic autonomy.

Supplier map: no single country supplies more than one critical layer

Capability	Platform	Principal supplier or designer	Comment
Carrier fighter	Rafale-M (26)	France [S2]	Government-to-government contract, April 2025
Conventional submarine	Scorpene-design Kalvari class; P-75I (planned)	France (design); Germany (P-75I partner); built in India [S9]	Technology partnership, domestic build
Maritime patrol	P-8I (12)	United States [S2]	Six more awaiting approval
Anti-submarine helicopter	MH-60R (24)	United States [S2]	22 delivered
Surveillance drone	MQ-9B	United States [S2][S14]	Leased and ordered
Surface combatants, SSBN	Nilgiri frigates; Arihant class	India [S2][S11]	Domestic design and build

CHAPTER 6 | GAPS IN ASSETS AND DOCTRINES

Where the force falls short of the mission

The gap analysis compares the mission the doctrine declares, which is to deter and, if needed, deny in the Indian Ocean and to be a first responder across a wider Indo-Pacific, with the force that exists and the force programmed. Figure 12 scores ten capability areas for 2026, 2030 and 2035 on the assumption that programmes deliver on current schedules. It is the analyst's judgement, not a measurement, but it is built on the programme data in this paper.

Capability readiness against the declared Indo-Pacific mission, 2026–2035
Delta Doctrines assessment (judgement, not measured data); projects delivery of programmes at current schedules without slippage.

	2026	2030	2035
Sea control: surface combatants	Adequate	Adequate	Strong
Sea denial: conventional submarines	Material gap	Material gap	Adequate
Nuclear attack submarines	Critical gap	Critical gap	Material gap
Carrier aviation (fighters)	Material gap	Material gap	Adequate
Maritime patrol aircraft	Adequate	Adequate	Adequate
Mine countermeasures	Critical gap	Material gap	Adequate
Unmanned / undersea domain awareness	Material gap	Material gap	Adequate
Fleet logistics & replenishment	Material gap	Adequate	Adequate
Joint / theatre command integration	Material gap	Adequate	Adequate
Industrial depth (shipyards, engines)	Material gap	Adequate	Adequate

Figure 12. Capability readiness against the declared mission. Delta Doctrines assessment; assumes current schedules hold.

The four critical gaps

Nuclear attack submarines. India has none in service. Project 77 envisages six, with two approved in October 2024, and the leased Chakra III has slipped to 2028 [S2]. Until an SSN force exists India cannot accompany a carrier group at sea against a modern submarine threat or hold a Chinese SSN at risk in the Bay of Bengal.

Mine countermeasures. The Navy's dedicated mine-clearance force is thin and ageing; twelve new MCMV received Acceptance of Necessity on 3 July 2025 but are not yet contracted [S2]. The Red Sea experience shows that mining or the threat of it can close a lane without a shot being fired.

Underwater and seabed awareness. INMSS-2026 extends domain awareness to underwater and seabed domains [S4]. The ambition outpaces the sensor network. A Chinese survey ship mapped the seabed south of the Nicobar Islands for weeks before an Indian aircraft tracked it [S6].

Conventional submarine numbers and age. Sixteen diesel-electric boats must cover three theatres and train for the future SSN force. P-75I (six boats) is stalled in approvals and P-76 (twelve) has not reached the Cabinet Committee on Security [S2][S9].

Doctrinal gaps

IDSA's assessment of the 2025 doctrine records several unresolved points. 'Preferred Security Partner' and 'First Responder' have no operational parameters; the shift away from 'Net Security Provider' is unexplained; 'No War, No Peace' is acknowledged to be hard to define; and the doctrine omits SAGAR and MAHASAGAR, which political leaders use to describe Indian maritime outreach [S3]. The 2026 strategy concedes shortfalls in force levels and in specialist domains such as cyber, space and AI, and flags implementation risks including the effects of theatre-command reform [S4].

Gap	Type	Evidence	Consequence	Closing action
No SSN in service	Asset	[S2]	No credible escort of carrier groups against submarines	Approve Project 77; fund the shipyard and reactor line
Mine countermeasures	Asset	12 MCMV AoN, uncontracted [S2]	Lane closure risk in the Gulf and Bay of Bengal	Contract; interim unmanned mine-hunting kit [S14]
Underwater domain awareness	Asset	[S4][S6]	Intruders stay undetected below the surface	Seabed arrays; unmanned underwater vehicles; P-8I follow-on
Hull delivery rate	Industry	45 under construction vs 75 awaiting contract [S2]	Target of 200+ ships slips	Parallel contracts; yard capacity under the shipbuilding package
Carrier replacement	Asset	IAC-2 pending [S10]	Vikramaditya retires in 10–12 years with no successor	CCS sanction; shared design with Vikrant
Theatre command	Doctrine	Final shape unknown [S13]	Navy role in joint theatres undefined	Decide a Maritime Theatre Command or equivalent
Partner roles undefined	Doctrine	[S3]	Partners cannot plan around Indian commitments	Publish operational parameters
Navy share of capital	Funding	17.5% vs 21% [S1]	Slower hull funding relative to Army and Air Force	Restore share toward 21% in 2027–28

ANALYST JUDGEMENT

India's gaps are concentrated below the surface and in the unglamorous end of naval power: mines, sensors and logistics. A fleet of fine frigates will not offset a thin submarine arm, and the Navy's own doctrine says as much by elevating underwater domain awareness. The order of investment should follow the order of vulnerability.

The cost of closing the gaps

Programme	Reported value (Rs crore)	Gap addressed
P-75I submarines	About 70,000 [S9]	Conventional submarine numbers
P-15C destroyers	About 50,000 [S2]	Escort and area air defence
P-17B frigates	About 40,000 [S2]	Surface escort renewal
Next Generation Corvettes	About 36,000 [S2]	Coastal and chokepoint patrol
Next Generation Missile Vessels	9,805 [S2]	Chokepoint strike
Next Generation OPV	9,781 [S2]	EEZ patrol
Sum of the six lines above	**About 2,15,586**	Not yet in Navy capital heads of 32,496 a year [S1]

The six reported values sum to roughly Rs 2.16 lakh crore, equal to about 6.6 years of the Navy's current capital heads of Rs 32,496 crore [S1]. The comparison is rough, because the programmes are paid over many years and the values come from different dates, and it excludes submarines beyond P-75I, SSN, MCMV and the carrier. It nevertheless shows why the Navy's capital growth matters: the order book is large relative to the budget line that must fund it.

CHAPTER 7 | MARITIME DOCTRINES

How India is designing its maritime doctrines

India's maritime thinking has moved from a first doctrine in 2004, revised in 2009, through the 2007 strategy Freedom to Use the Seas and the 2015 Ensuring Secure Seas, to a coordinated pair in 2025–26: the Indian Maritime Doctrine 2025, released by the Chief of the Naval Staff, Admiral Dinesh K. Tripathi, on 2 December 2025, and the Indian Navy Maritime Security Strategy, April 2026 [S3][S4]. The doctrine sets concepts; the strategy sets ends, ways, means and risks.

Two decades of published maritime doctrine and strategy, culminating in 2025–26

Doctrine (Navy, naval strategic publication) and strategy documents. Dates from IDSA assessments; 2004 and 2007 per Navy's public record.

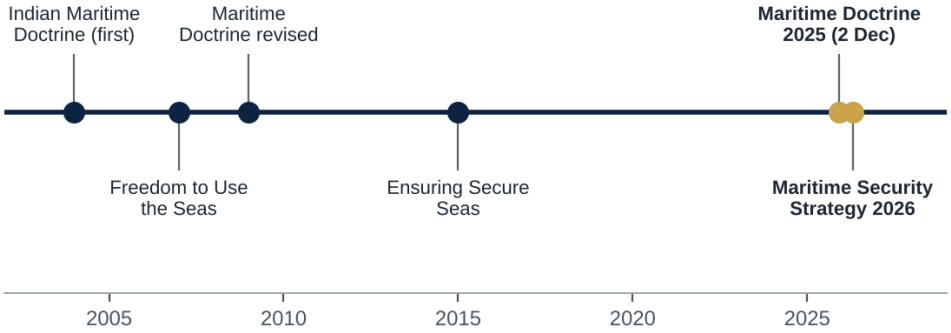


Figure 11. Published maritime doctrine and strategy documents. [S3][S4]

Feature	Doctrine 2009 / Strategy 2015	Doctrine 2025 / Strategy 2026
Spectrum of conflict	Internal and external operations	Linear continuum: peace, No War No Peace, war [S3]
Domains	Primarily sea, air, undersea	Land, sea, air, space, cyber and cognitive [S3]
Area of interest	Primary and secondary areas	India, Indian Ocean Region, Indo-Pacific; area of interest versus area of responsibility [S3][S4]
Deterrence	Nuclear and conventional	Three tiers: nuclear, conventional, sub-conventional [S4]
Role of partners	Net security provider	Preferred security partner; first responder [S3]
Awareness	Maritime domain awareness	Operational, national, regional and international tiers; underwater, seabed and near-space awareness [S4]
Structure of strategy	Five constituent strategies	Ends, threats, means, ways, risks, enablers [S4]
Technology	Limited treatment	AI, autonomy and robotics as threats and enablers [S3][S4]

What the new design signals

It institutionalises the grey zone. By naming 'No War, No Peace' as an operational category, the Navy accepts that most of its work is competition below the threshold of conflict, where presence, surveillance and information shape outcomes [S3][S4]. **It adopts jointness as a principle of war**, calling for integrated organisations, combined training and common procurement and planning [S3]. **It adds a deterrence rung**: the strategy states that India's nuclear posture does not constrain its response to terrorism [S4]. **It admits limits**: the strategy acknowledges shortfalls in planned force levels and in cyber, space and AI skills [S4].

> ANALYST JUDGEMENT
> The 2025–26 documents are good at concepts and thin on numbers. They set the vocabulary for a funding argument but do not themselves fund anything. IDSA's reviewers expect the strategy to reconcile ambition with budgets and set priorities and timelines [S3]; the 2026 text takes a first step, but the capability priorities still sit in programme documents rather than in public doctrine.

CHAPTER 8 | MARITIME APPARATUS

How India is designing its maritime apparatus

The apparatus is the structure that turns doctrine into action: commands, information systems, shipyards and the procurement chain. Four elements are changing at once. The Navy is reorganising its operations around jointness; it is building an information-fusion picture across levels; it is increasing the throughput of its shipyards; and it is moving procurement from imports to domestic production.

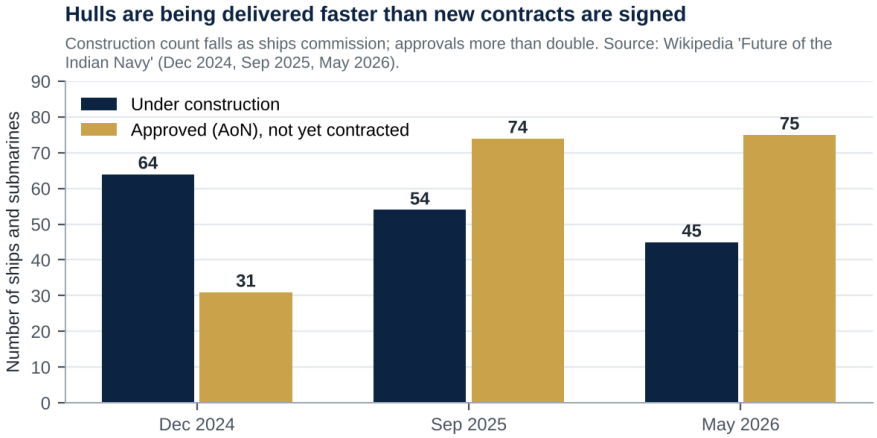


Figure 10. Hulls under construction and hulls approved but not yet contracted. [S2]

Element	Design direction	Evidence	Open question
Command	Theatre commands described by the Navy chief as the 'ultimate goal'; one possible shape is two land-facing theatres plus a maritime theatre [S13]	[S13]	Air Force caution on speed; command arrangements for carriers
Awareness	Four-tier maritime domain awareness: operational, national, regional, international; extension to underwater and seabed [S4]	[S4]	Sensor coverage and data-sharing rules
Industry	75% domestic share; new yard clusters in Andhra Pradesh, Gujarat and Tamil Nadu [S1][S8]	[S1][S8]	Skills and engines; supply chain depth
Throughput	A vessel every six weeks from 2026; 19 commissionings planned in 2026 [S2][S6]	[S2][S6]	Whether new contracts follow at the same pace
Partners	Preferred security partner and first responder language; 65 navies at the 2026 fleet review [S3][S6]	[S3][S6]	Operational definition
Support	First Fleet Support Ship, Surya, launched 6 October 2026 [S14]	[S14]	Number of replenishment ships needed for two carrier groups

Reading the order book

Figure 10 shows a healthy delivery pipeline and a growing contract backlog. Construction fell from 64 hulls in December 2024 to 45 in May 2026 because ships were commissioned; approvals rose from 31 to 75 because the Navy and the Defence Acquisition Council cleared programmes [S2]. If those 75 hulls move to contract within two to three years, construction would roughly rebound to 100 or more. If they do not, the fleet will plateau near 150 in the early 2030s. The next 18 months of contract signings are therefore the best leading indicator of the 2035 fleet.

> ANALYST JUDGEMENT
>
> The Navy's apparatus is more mature in industry and information than in command. A shipbuilding system that delivers a hull every six weeks needs a theatre structure that tells it which fleet to build for. Until the maritime theatre decision is taken, force-planning arguments are made in the language of platforms, not missions.

CHAPTER 9A | BUILDING ASSETS: NAVAL WARSHIPS

Surface combatants: the frigate and destroyer pipeline

The surface fleet is the part of the build programme that is furthest advanced and most dependent on domestic yards. The Navy reports more than 140 warships in service in May 2026, 19 commissionings planned for the year and about 45–50 ships under construction at Mazagon Dock, Garden Reach and Cochin shipyards [S2][S15]. Recent commissionings include the Nilgiri-class frigate INS Dunagiri on 21 June 2026, the survey vessel INS Sanshodhak and ASW shallow-water craft INS Agray, followed by the second Mahe-class craft INS Malvan on 22 July [S14].

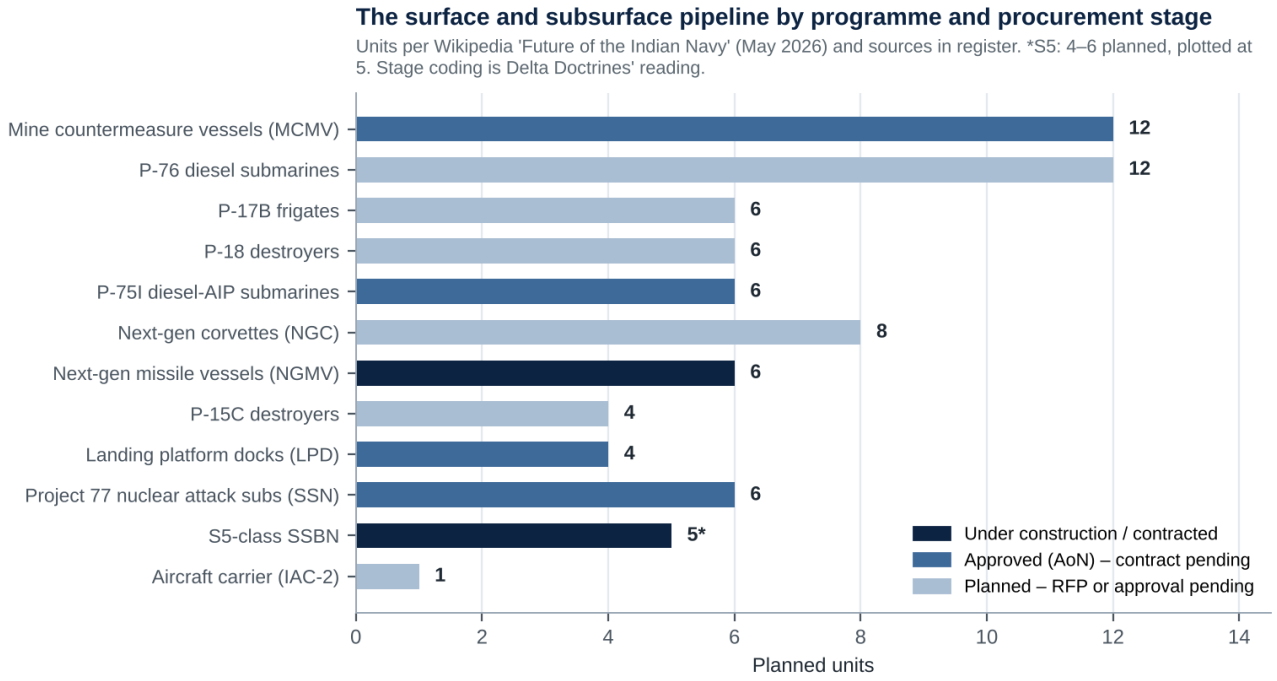


Figure 9. Planned units by programme and procurement stage, covering surface, subsurface and carrier programmes. [S2]; stage coding by Delta Doctrines.

Programme	Planned	Status in open sources	Contract value (where reported)
P-15C destroyer	4	Planned; RFP 2027, construction from 2030 [S2]	About Rs 50,000 crore [S2]
P-17B frigate	6	Planned; RFP 2027, construction from 2031 [S2]	About Rs 40,000 crore [S2]
P-18 destroyer	6	Planned; RFP 2029, construction from 2034 [S2]	Not stated
Next Generation Corvette	8	Planned; GRSE lowest bidder for five [S2]	About Rs 36,000 crore [S2]
Next Generation Missile Vessel	6	First keel laid at Cochin on 20 Sep 2026; deliveries from March 2027 [S14][S2]	Rs 9,805 crore [S2]
Next Generation OPV	n/s	Contract signed [S2]	Rs 9,781 crore [S2]
Mine countermeasure vessel	12	AoN 3 July 2025 [S2]	Not stated
Landing platform dock	4	AoN 23 Oct 2025; Navantia and L&T offered LHDs 9 Oct 2026 [S2][S14]	Not stated

Analysis

The surface programme is balanced between destroyers and frigates for fleet escort, corvettes and missile vessels for coastal and chokepoint work, and amphibious ships for the first responder role in the doctrine. Two risks stand out. Destroyers and frigates in the P-15C, P-17B and P-18 programmes begin construction only in the 2030s, which leaves a delivery gap between the Kolkata, Visakhapatnam and Nilgiri classes and their successors. And the Navy's heavy dependence on a few shipyards means any one yard's delay propagates through the whole schedule.

CHAPTER 9B | BUILDING ASSETS: STRATEGIC ASSETS AND FORCE MULTIPLIERS

Aircraft carriers: replacement, not expansion

India operates two carriers: INS Vikramaditya, a refurbished Russian ship, and the indigenously built INS Vikrant, a 45,000-tonne vessel [S2][S10]. The Navy had sought a third carrier, but the Government preferred to invest in submarines for sea denial, and the Navy now describes the second indigenous carrier, IAC-2, as the replacement for Vikramaditya, which is expected to be phased out in 10 to 12 years [S10]. IAC-2 is described as about 65,000 in design displacement with electric propulsion and CATOBAR launch, and would take 10 to 12 years to build from sanction [S10]. As of the latest reports it was still pending before the Cabinet Committee on Security [S6].

Carrier	Status	Displacement	Air wing	Reported detail
INS Vikramaditya	In service; ageing	About 45,000 t (Kiev-class conversion)	MiG-29K	Phase-out expected in 10–12 years [S10]
INS Vikrant (IAC-1)	In service	About 45,000 t [S2][S10]	MiG-29K; Rafale-M to follow	Indigenous; STOBAR
IAC-2	Proposed; pending CCS	About 65,000 (design figure) [S10]	Rafale-M or a catapult-capable type	CATOBAR, electric propulsion [S10]
INS Vishal (earlier concept)	Concept	75,000 t [S2]	Not specified	Planned in the earlier three-carrier concept [S2]

The case for and against

For: a carrier gives India air power at sea beyond the range of shore-based aircraft, supports the 'first responder' mission in the western Indian Ocean and the Gulf of Aden, and projects presence that no number of submarines can. **Against:** the Government's own preference for submarines, the vulnerability of carriers to anti-ship missiles (a point attributed to former CDS Bipin Rawat in open reporting), and the cost, which includes the escort fleet and air wing as well as the hull [S10]. A carrier is a system of systems: without MCMVs, SSNs, replenishment ships and airborne early warning, it is a very large target.

Other force multipliers

Beyond the carrier, the force multipliers that matter are **replenishment ships** (the Fleet Support Ship Surya was launched on 6 October 2026 [S14]), **amphibious ships** (four LPDs approved, with Navantia and L&T offering LHDs [S2][S14]), **loitering munitions** (an RFI for ship-based loitering munitions with a 1,000 km range issued 7 September 2026 [S14]) and **unmanned mine warfare** (L&T and Exail partnership, May 2026 [S14]). DRDO tested missiles in June 2026, including anti-ship and hypersonic ground-attack types and two ballistic-missile-defence interceptors [S14].

> ANALYST JUDGEMENT
> India's carrier decision is a bet that the Navy's mission in the next decade is denial and presence, not strike. IAC-2 is justified only if it is built with the escort and air wing around it. Without MCMVs, SSNs and replenishment ships, a second carrier would add risk faster than it adds capability. The most important carrier decision is therefore the sequencing of the supporting ships.

Air-wing arithmetic

Twenty-six Rafale-M aircraft [S2] are a bridge, not a full complement for two carriers. A carrier typically embarks a fighter squadron or more, and an attrition and training reserve is needed on top. On Delta Doctrines' reading, 26 aircraft can sustain one carrier's fighter component at best, so IAC-2 will force a second fighter decision, either more Rafale-M or a catapult-capable alternative.

CHAPTER 9C | BUILDING ASSETS: SUB-SURFACE

Submarines, mines and the undersea domain

The subsurface build is the most consequential and the most delayed part of the plan. It has three strands: a sea-based deterrent that is now operational, conventional submarines to replace ageing boats and expand the force, and a nuclear attack submarine programme that has yet to produce a hull.

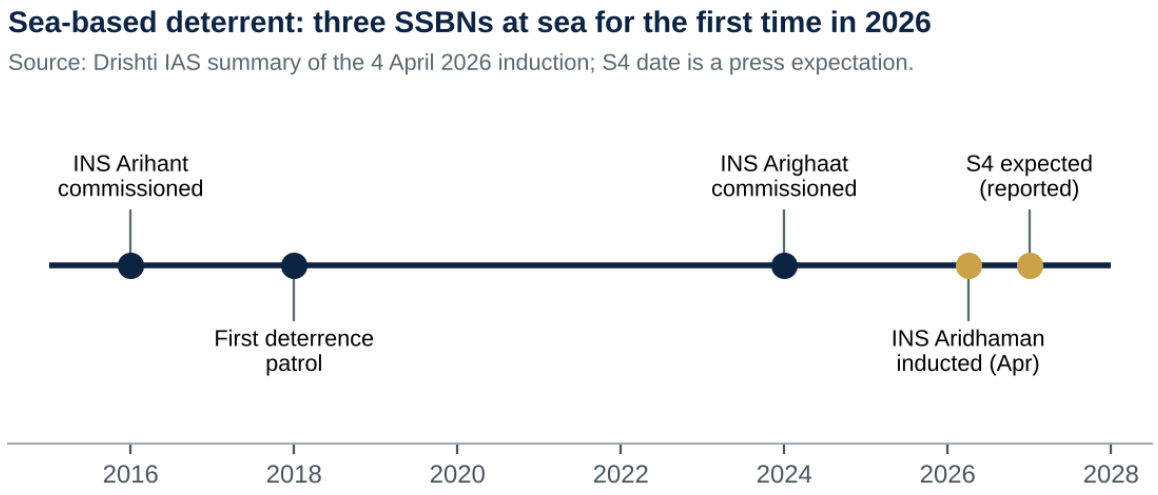


Figure 15. Arihant-class SSBN milestones. [S11]

Programme	Planned	Status	Strategic role
Arihant-class SSBN	4 (S4 under construction)	INS Arihant 2016; INS Arighaat 2024; INS Aridhaman inducted 4 Apr 2026 (7,000 t, 8 launch tubes, K-4 missile with 3,500 km range); S4 expected 2027 [S11]	Second-strike deterrent; first time three SSBNs at sea [S11]
S5-class SSBN	4–6	Construction started; four expected in the late 2030s [S2]	Larger deterrent boats
Project 77 SSN	6	Two approved Oct 2024 [S2]	Hunter-killer; carrier escort
Chakra III (leased SSN)	1	Delivery delayed to 2028 [S2]	Training bridge to SSN force
P-75 Kalvari-class	6 built; 3 more under consideration	Last of six in service; follow-on may be scrapped [S2]	Conventional sea denial
P-75I (MDL and TKMS)	6	About Rs 70,000 crore; air-independent propulsion; awaiting CCS approval as of 17 Aug 2026 [S9]	Longer-submerged conventional boats
P-76	12	Planned; awaiting CCS approval [S2]	Follow-on conventional boats
Mine countermeasures	12 MCMV	AoN 3 July 2025; unmanned mine warfare offered by L&T and Exail [S2][S14]	Approach clearance; denial of lanes

Analysis

The sea-based deterrent is on track; the hunter-killer force is not. India has 3 SSBNs against China's 6 and no SSN against China's 6, with ONI projecting China's SSN count at 13 by 2030 [S5][S11]. P-75I is the nearest decision: it brings air-independent propulsion, longer submerged endurance and German design to Indian yards, and about Rs 70,000 crore of spending [S9]. Its delay reflects negotiations over technical requirements, commercial terms and technology transfer [S9]. If approved in late 2026, first deliveries would plausibly come in the early 2030s; no delivery schedule is stated in the sources.

> ANALYST JUDGEMENT
> The SSN programme is the decisive long-lead item because it cannot be bought off the shelf and takes the longest to mature. A decision slipping by two years delays the whole subsurface fleet by about as much. Of everything in this chapter, a Project 77 contract matters most.

CHAPTER 9D | BUILDING ASSETS: NAVAL AIR

Naval air assets: fighters, patrol aircraft and unmanned systems

Naval aviation is the quickest-moving part of the build. The Navy's aircraft inventory was 251 in December 2024 and is planned to grow to 314 by 2030 [S2][S15]. Its main programmes are carrier fighters, maritime patrol aircraft, helicopters and unmanned aircraft.

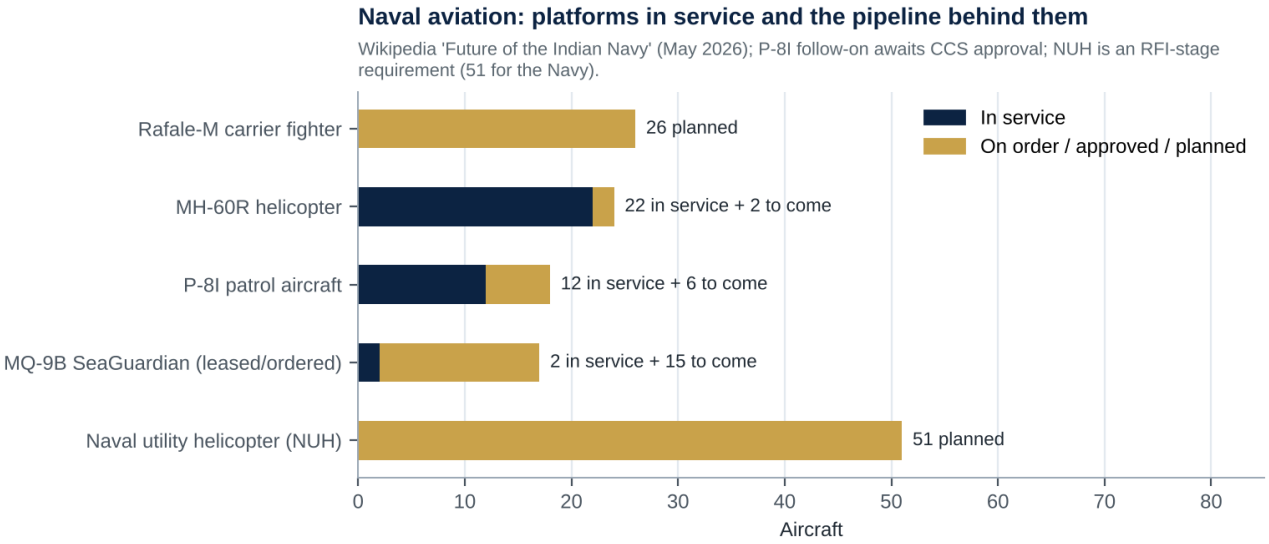


Figure 16. Naval aircraft in service and in the pipeline. [S2][S14]

Platform	Role	Numbers	Status
Rafale-M	Carrier fighter replacing MiG-29K	26 on order	Contract April 2025; first delivery expected Aug–Sep 2026; all by 2030 [S2]
MQ-9B SeaGuardian	Long-endurance maritime surveillance	2 in service (leased); 15 on order; 2 more leased Aug 2026	Deliveries of purchased aircraft from January 2029 [S2][S14]
P-8I Neptune	Long-range maritime patrol and ASW	12 in service; 6 approved	Six more await CCS approval [S2]
MH-60R	Anti-submarine and anti-surface helicopter	24 ordered; 22 delivered	Contract Feb 2020, about Rs 15,157 crore [S2]
Naval Utility Helicopter	Utility and SAR	51 for the Navy (76 including Coast Guard)	RFI issued August 2025 [S2]

Analysis

The pattern is that India is buying the platforms that extend sensing and reach: P-8I and MQ-9B for surveillance, MH-60R for submarine hunting, Rafale-M for fleet air defence and strike. Of these, the P-8I fleet has the highest return against the Chinese submarine and survey presence in the Indian Ocean, because each aircraft covers a large area and can be sustained from shore. The weakness is airborne early warning and tanker support at sea, which the open sources do not show as funded programmes, and a carrier air wing in transition from MiG-29K to Rafale-M with only 26 aircraft planned. Rafale-M deliveries had not been confirmed in the sources available at the time of writing.

Decisions to watch

Three decisions will shape naval aviation in the next two years: Cabinet approval for the six additional P-8I; the second fighter order for IAC-2; and the 1,000 km ship-based loitering munition requirement issued as an RFI on 7 September 2026 [S2][S14]. Together they would extend the Navy's sensing, carrier strike and over-the-horizon strike reach. The risk is again sequencing: platforms arrive before the supporting infrastructure (tankers, airborne early warning, secure data links) is in place.

CHAPTER 10 | STRATEGY AGAINST CHINA'S THREAT

A phased strategy: see, deny, deter, then project

Delta Doctrines reads India's emerging approach to China as a four-stage sequence rather than a single plan. Each stage builds on the previous one, and the stages overlap. The sequence follows from the doctrine's logic and the programme timelines in Chapter 9; it is the analyst's synthesis, not a published Indian plan.

Phase	Objective	Principal means	Window	Evidence of progress
1. See	Know what Chinese vessels and submarines are doing in the Indian Ocean	P-8I, MQ-9B, MH-60R, shore radars, Information Fusion Centre, seabed sensing	Now to 2028	Survey ship near Nicobar tracked by P-8I [S6]; MQ-9B lease extended Aug 2026 [S14]
2. Deny	Make sustained Chinese operations costly at the western mouth of Malacca and in the Bay of Bengal	P-75I, MCMV, NGMV, ASW shallow-water craft, island-based assets	2026 to 2032	Mahe-class craft commissioned; NGMV keel laid 2026 [S14]
3. Deter	Convey that harm to Indian interests would be answered across tiers	Three SSBN; Rafale-M; missile vessels; doctrine's three deterrence tiers	Now to 2035	Aridhaman inducted Apr 2026 [S11]; INMSS-2026 [S4]
4. Project	Present limited power beyond the Indian Ocean in partnership	IAC-2, SSN, amphibious ships, replenishment ships, partner access	2032 onward	Fleet Support Ship Surya launched Oct 2026 [S14]; LPD AoN Oct 2025 [S2]

Phase 1 and 2: where the strategy is strongest

India's strongest card is geography. The Nicobar and Andaman approaches give it the ability to observe nearly every Chinese vessel entering the Bay of Bengal from the east. Combining aerial surveillance with submarine patrols and shore-based sensors lets India convert geography into persistence. The Navy's wider claim that it is the 'primary instrument' of maritime power in a whole-of-nation approach [S4] implies that the coast guard, fisheries, ports and the merchant marine are meant to be part of the same sensing system.

The three-tier deterrence logic

INMSS-2026 distinguishes nuclear, conventional and sub-conventional deterrence [S4]. For China, the relevant tier is conventional: the ability to impose cost on Chinese deployments in the Indian Ocean. The sub-conventional tier addresses terrorism and proxy activity and is aimed chiefly at Pakistan-linked threats. The nuclear tier, now with three SSBNs on patrol [S11], backstops the others by limiting escalation. The design intent is that an adversary should not be able to exploit a gap between tiers.

> ANALYST JUDGEMENT
> India does not need to defeat the PLAN. It needs to ensure that, for any plausible Chinese objective in the Indian Ocean, the cost of achieving it exceeds the benefit. That is a modest military goal and a hard industrial one, because it depends on many unglamorous capabilities arriving together.

Indicators to track, 2026–2030

Indicator	Direction that signals progress	Where to look
CCS decision on P-75I and Project 77	Approval in 2026–27	Cabinet announcements; MDL disclosures [S9]
Approved-uncontracted hull count	Falling from 75	Defence Acquisition Council and contract notices [S2]
Hulls under construction	Rising from 45	Navy and shipyard disclosures [S2]
Chinese research vessels in Indian Ocean	Tracked and published by India	CSIS-type reviews [S6]
Navy share of capital acquisition	Rising toward 21%	Union Budget analysis [S1]
MCMV contract	Signed	Ministry of Defence releases [S2]

Escalation ladder and Indian options

Level	Chinese action	Indian response	Capability needed	Readiness (2026)
1. Presence	Survey ships and research vessels in Indian EEZ approaches	Track, publish, diplomatic protest	P-8I, MQ-9B, Information Fusion Centre	Good
2. Access	Port calls and logistics support at partner ports	Offer rival access; naval diplomacy	Partnerships, fleet support ships	Moderate
3. Submarine patrol	SSN or SSK patrols in the Bay of Bengal or Arabian Sea	ASW search, shadowing, signalling	P-8I, MH-60R, ASW craft, submarines	Moderate; thin below the surface
4. Coercion	Interference with Indian assets or merchant shipping	Escort, interdiction, mine clearance	Frigates, MCMV, NGMV	Weak in mines
5. Blockade attempt	Interdiction of Indian shipping or energy flows	Counter-interdiction; deterrent signalling	SSN, carrier group, tankers and replenishment	Not yet adequate
6. Conflict	Limited conflict at sea tied to a land border crisis	Maritime theatre action; horizontal escalation	Joint command; long-range strike	Command still unsettled

Horizontal escalation: the maritime option in a land crisis

A defining feature of the Indo-Pacific for India is that a crisis on the Himalayan border could be answered at sea. The Navy chief's backing for theatre commands, with a possible maritime theatre alongside two land-facing theatres [S13], reflects that logic. India's maritime leverage rests on China's energy and trade passing through chokepoints within reach of the Andaman and Nicobar approaches. This is the same geography that makes India's own dependence on the Hormuz and Red Sea routes a vulnerability (Chapter 2), which is why any such strategy has to be defensive in intent and restrained in practice.

Risks to the strategy

Delay. The key programmes arrive in the 2030s. If a crisis comes sooner, India will have fewer SSNs, more old boats and incomplete mine countermeasures than the plan assumes. **Over-reliance on surveillance.** Seeing a survey ship is not the same as stopping it, and publicising observations has limited effect on a state that does not care for the publicity. **Partner dependency.** Some of the sensors and platforms (P-8I, MQ-9B, MH-60R) are American. **Coastal state hedging.** Sri Lanka, the Maldives, Myanmar and Bangladesh may trade access to both sides.

> DELTA DOCTRINES ASSESSMENT
> India's China strategy is credible for levels 1 to 3 on the ladder and uneven at levels 4 and 5. The largest gap is mine countermeasures and the SSN force. India should prioritise the programmes that raise levels 4 and 5 over additional surface ships, because the bottleneck to deterrence is below the surface, not on it.

Why partners matter more in the east than in the west

In the western Indian Ocean India has own-force advantages and few challenges; in the east it faces the approach of Chinese forces through the Malacca route and needs partner access to keep a presence across the Bay of Bengal and the Andaman Sea. That asymmetry explains the Navy's investment in the Andaman and Nicobar chain and its exercises with Southeast Asian and Quad navies [S14]. Each additional partner port within reach of the Malacca approaches reduces the time India needs to respond to a Chinese deployment.

CHAPTER 11 | STRATEGY FOR US INDO-PACIFIC COMMAND INFLUENCE

Strategy: partner in practice, autonomous in structure

Chapter 5 described how India balances US influence in general. This chapter addresses the specific interface with the Indo-Pacific Command, the US military command responsible for the region in which India's maritime area of interest lies. The 22nd Military Cooperation Group meeting between the United States and India is a regular venue for the working-level agenda [S17], and the 31 October 2025 ten-year framework sets the political frame [S12].

Strategy element	Indian action	Purpose	Indicator to watch
Keep command lines separate	No integrated command with INDOPACOM; coordination through exercises and liaison	Preserve independent decision-making in a crisis	Absence of combined command structures
Use exercises as signalling, not commitment	Malabar and bilateral exercises with defined scenarios	Interoperability without obligation	Scenario scope; involvement of other Quad navies
Control data flows	Fuse maritime domain awareness nationally before sharing	Keep a sovereign sea picture	Rules for sharing Indian Ocean data
Anchor the Indian Ocean as an Indian priority	Keep the Indian Ocean Region, not the Western Pacific, as the primary area [S3]	Avoid being drawn into a distant war	Where the Navy's deployments concentrate
Insure against volatility	French and domestic suppliers; 75% domestic procurement share [S1]	Reduce US leverage over key platforms	Share of Navy platforms with a single foreign supplier
Use the framework for industrial gain	Co-production and R&D under the 2025 framework [S12]	Convert alignment into capability	Co-production milestones

The command-level interface

INDOPACOM's weight in Indian planning is greatest in three areas: information (the US shares and receives data on the Indian Ocean), logistics (reciprocal access arrangements that India signed over 2016 to 2020) and operations (Malabar and the Quad format). The 2025 framework provides policy direction across exercises, technology and industry [S12]; it does not, in the published record, create basing commitments or a combined command [S12]. Indian planners therefore treat INDOPACOM as a partner command to be coordinated with rather than a command to be integrated into.

Managing three risks

Entrapment. India reduces entrapment risk by keeping its operations under national command and by declining to define roles for itself in third-country contingencies. **Abandonment.** India reduces abandonment risk by building the denial layer described in Chapter 4 and by diversifying suppliers. **Dependence.** India reduces dependence through co-production and domestic design authority, which the framework's industrial pillar supports [S12].

> ANALYST JUDGEMENT
> The Indian strategy toward INDOPACOM is a hedge, and hedges are expensive. India pays for it in the cost of building duplicate capability and in the slower pace of integration compared with allies. In return it keeps its freedom to choose when and where to act. For a navy whose central mission is the Indian Ocean, that freedom is worth the cost.

What INDOPACOM can and cannot do for India

Can do	Cannot or will not do
Share surveillance and intelligence on Indian Ocean traffic	Command Indian forces or integrate them into a combined command
Provide platforms, training and exercises	Guarantee supply in a political dispute
Supply a deterrent signal through presence	Replace Indian presence in the Bay of Bengal and Arabian Sea
Support co-production and technology access	Offer India a treaty guarantee

CHAPTER 12 | SAFEGUARDING COMMERCIAL AND ECONOMIC ROUTES

Protecting the sea lanes that carry the economy

Safeguarding trade routes is the operational purpose behind the entire build programme. The strategy has three components: keep chokepoints open, keep the supply chain resilient if they close, and protect the physical infrastructure at sea, including cables, pipelines and offshore energy. India's exposure was set out in Chapter 2: over 90% of trade by volume by sea, 80–85% of crude imports through Hormuz and 30–35% of merchandise exports through the Red Sea–Suez corridor [S7].

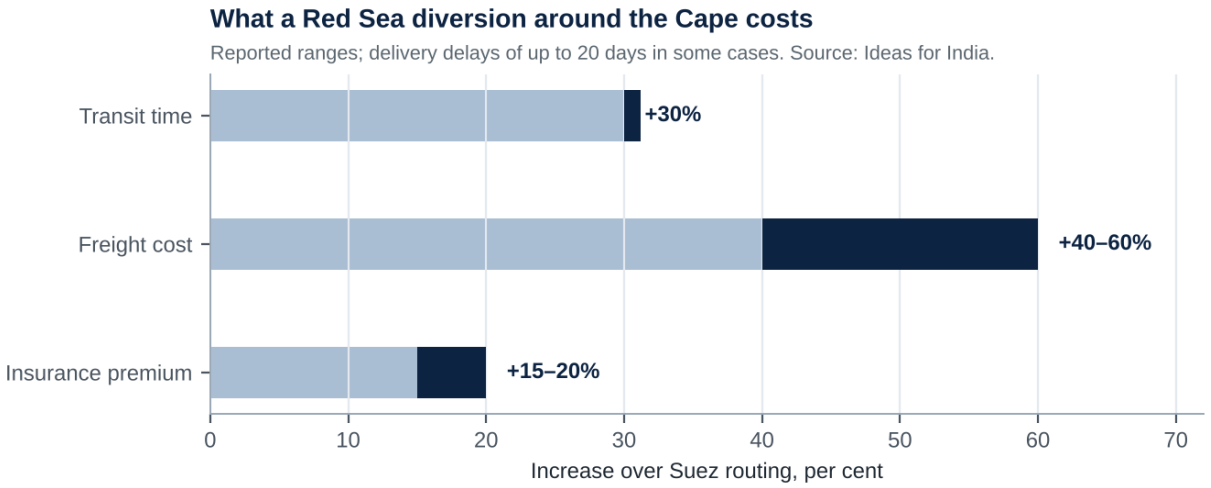


Figure 5. Reported cost increases when shipping is rerouted around the Cape of Good Hope. [S7]

Exposure by sector

Sector	Share of exports via Red Sea–Suez	Principal destination	Sensitivity to delay
Textiles and apparel	35–40%	Europe and North America east coast	High; seasonal contracts
Pharmaceuticals	30–35%	Europe, North America, North Africa	High; cold-chain and regulatory
Engineering goods	28–32%	Europe and West Asia	Medium; just-in-time inputs
Processed food and agriculture	25–30%	West Asia, North Africa, Europe	High; perishables
All merchandise exports	30–35%	Europe 16–18%; North America east coast 7–9%; North Africa and West Asia 6–8%	Aggregate effect on freight and insurance

The three-part approach

Keep chokepoints open. The Navy has deployed ships to the Gulf of Aden and Red Sea, and INMSS-2026 names supply-chain and energy vulnerabilities as core threats [S4]. The operational tools are escort, presence, mine clearance and partnership with other navies. **Keep the economy resilient.** Strategic petroleum reserves, diversified crude suppliers and alternative shipping routes shorten the time over which India can absorb a closure; the sources reviewed do not give Indian reserve figures, so none are asserted here. **Protect the assets.** The doctrine and strategy both flag critical undersea infrastructure as a grey-zone target [S3][S4].

> ANALYST JUDGEMENT
> Safeguarding routes is largely a peacetime task: presence, awareness and insurance confidence. The Navy's most valuable contribution is to be seen to be there. The Red Sea diversion cost in Figure 5 shows that confidence is as valuable as actual escort: when insurers and charterers lose confidence, costs rise before any ship is hit.

Three routes, three problems

Route	Vulnerability	Indian instrument	Gap
Persian Gulf and Hormuz	About 80–85% of crude imports; Gulf conflict risk [S7]	Presence in the Gulf of Oman; MCMV; partners in the Gulf; energy diversification	Mine countermeasures; limited forward basing
Red Sea and Bab el-Mandeb	30–35% of merchandise exports; piracy and missile threats [S7]	Gulf of Aden deployments; escort of Indian-flagged ships; Djibouti presence is Chinese [S6]	No Indian base; reliance on partner ports
Malacca and the Bay of Bengal	Eastern trade and Chinese energy transit; PLAN approach [S6][S7]	Andaman and Nicobar Command; P-8I; Changi and Sabang access	Undersea sensing; SSN force

Undersea infrastructure and offshore assets

The doctrine and strategy both identify critical undersea infrastructure as a grey-zone target [S3][S4]. Cables carry most of India's international data, and offshore oil and gas platforms and pipelines form part of the energy system. The protection problem is hard because the assets are numerous, remote and difficult to monitor, and attribution after a cut is slow. India's response in doctrine is to extend maritime domain awareness to the seabed, to build underwater sensing and to pursue deterrence in the sub-conventional tier [S4]. What is not yet visible in open sources is a published protection regime: who patrols, what the legal basis is and how data is shared with industry.

Shipbuilding and the merchant fleet

The commercial side of route security is the ownership of ships. The Government approved a Rs 69,725 crore package in 2026 to expand shipbuilding capacity to 4.5 million gross tonnes a year, with three greenfield clusters in Andhra Pradesh, Gujarat and Tamil Nadu and a fleet acquisition plan of over 400 vessels [S8]. Infrastructure status was notified on 19 September 2025 for Indian-flagged commercial vessels of 10,000 gross tonnes and above [S8]. The security logic is simple: a country that depends on foreign-flag ships and foreign insurers for 90% of its trade holds less control in a crisis.

Port and logistics security

Port security is the inner layer in Figure 17: coastal radar, Coast Guard and port-state controls. The Coast Guard's 2026–27 budget estimate of Rs 8,393 crore is about 13% below the previous year's Rs 9,677 crore [S1], a reduction that sits awkwardly with the doctrine's emphasis on grey-zone activity and the Navy chief's warning about fishing vessels [S13]. This is a gap worth watching: the inner layer depends on an agency whose budget fell in the same year the Navy's doctrine put the coast first.

> **DELTA DOCTRINES ASSESSMENT**
>
> The best insurance for routes is a combination of presence, resilience and ownership: ships at sea, stocks at home and Indian-flag tonnage in service. The Navy owns the first, the Government owns the other two, and the three are rarely planned together. A joint maritime security plan covering all three would be the single most useful policy innovation.

A Hormuz closure, illustrated (Delta Doctrines scenario)

Period	Likely effect on India	Naval task
Days 1–7	Spot freight and insurance spike; tanker diversions; stocks absorb the shock	Surge presence; escort; liaison with merchant fleet
Days 8–30	Refinery run cuts if alternative crude is not secured; export delays	Convoy and mine clearance; protect alternative routes
Beyond 30 days	Macro impact on inflation and the current account	Sustained escort; replenishment; partner coordination

The scenario is illustrative and not a forecast. It uses the dependence figures in Chapter 2: about 80–85% of crude imports pass through Hormuz [S7].

CHAPTER 13 | GOVERNMENT INVESTMENT AND STRATEGIC PUSH

The budget: capital rising fast, Navy share falling

The 2026–27 defence budget is the largest in India's history. The Ministry of Defence's budget estimate is Rs 7,84,678 crore, up 15.2% from the previous year's Rs 6,81,210 crore, equal to 14.7% of central government expenditure and 2.0% of GDP, up from 1.9% [S1]. Capital outlay on defence services rises 21.8% to Rs 2,19,306 crore, and capital acquisition rises 24.6% to Rs 1,85,467 crore [S1]. Revenue spending is 70.6% of the total and capital 29.4% [S1].

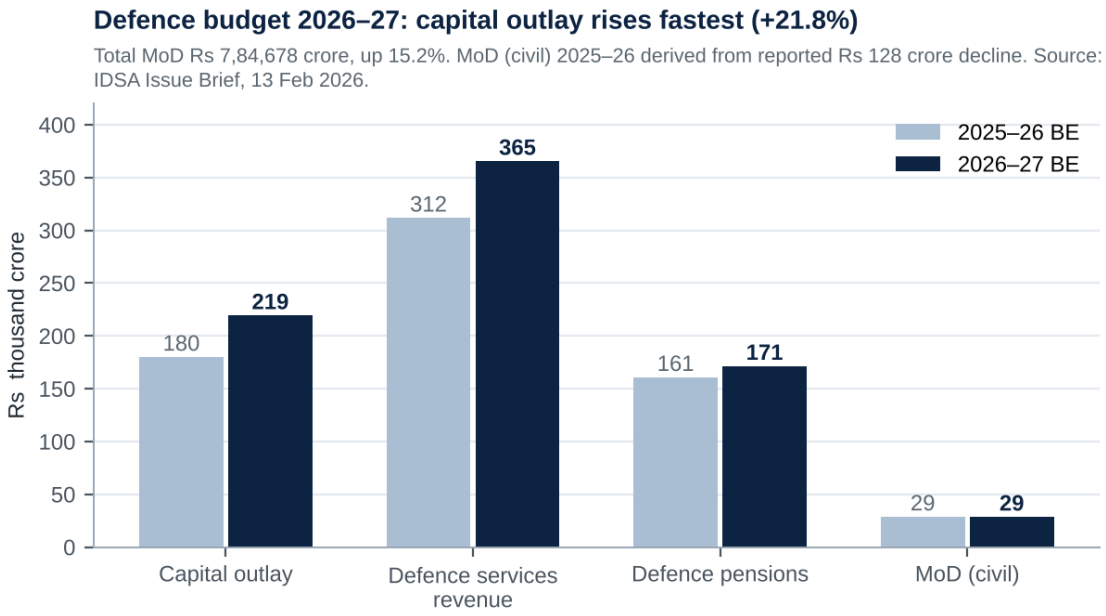


Figure 6. Main components of the defence budget, 2025–26 BE and 2026–27 BE. [S1]

What the Navy receives

The Navy's capital heads, taken together as Naval Fleet, Naval Dockyard and Projects, and Joint Staff, total Rs 32,496 crore, against Rs 31,244 crore a year earlier, about 4% growth and 17.5% of capital acquisition, down from 21% [S1]. The Naval Fleet head rises 2.6% to Rs 25,024 crore, the Dockyard head falls 3.7% to Rs 4,334 crore and Joint Staff, which IDSA groups with the Navy's capital budget, rises 33.4% to Rs 3,139 crore [S1]. One secondary outlet reports a Navy allocation of Rs 1,07,549 crore for 2026–27 [S15]; the figure probably includes revenue spending and could not be reconciled with the IDSA capital heads, so Delta Doctrines does not rely on it.

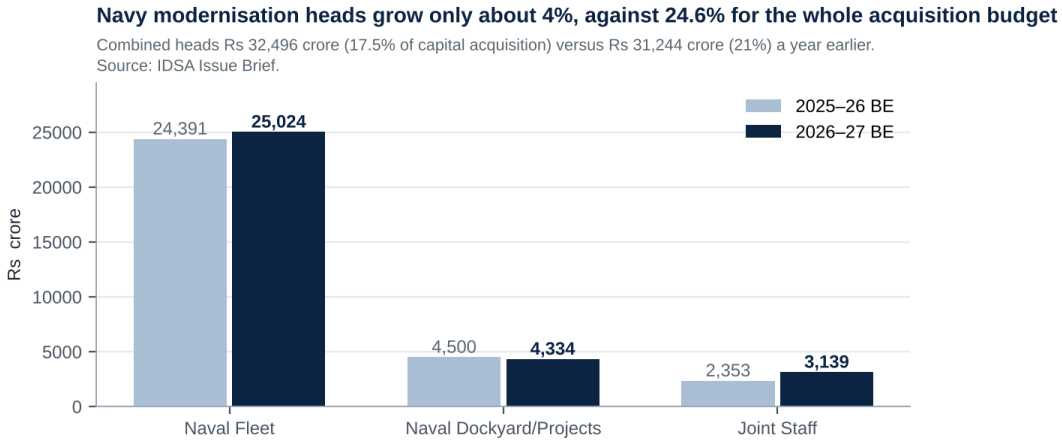


Figure 7. Navy capital heads, 2025–26 BE and 2026–27 BE. [S1]

Industrial push: from importing to building

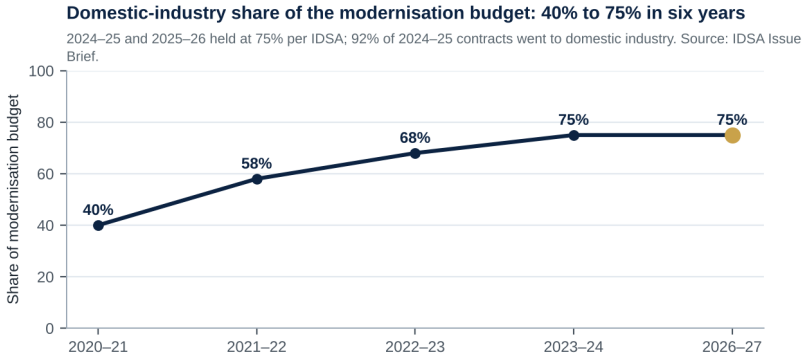


Figure 8. Domestic-industry share of the modernisation budget. [S1]

The domestic share of the modernisation budget rose from 40% in 2020–21 to 75% from 2023–24, including 2026–27, with 92% of 2024–25 contracts going to domestic industry [S1]. For the Navy, this means that ships and submarines are built by Mazagon Dock, Garden Reach and Cochin shipyards, with foreign partners as technology providers, as in the proposed P-75I partnership with Germany's TKMS [S9]. The 2026–27 budget also raises research and development capital outlay 15.6% to Rs 17,250 crore, about 8% of capital outlay [S1].

Commercial shipbuilding as a strategic enabler

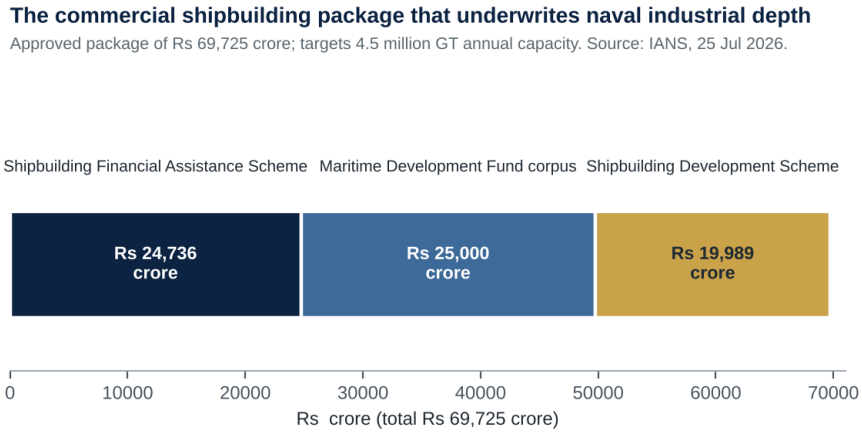


Figure 14. Components of the Rs 69,725 crore shipbuilding package. [S8]

Investment line	Amount (Rs crore)	Change / note	Source
MoD budget 2026–27	7,84,678	+15.2%; 2.0% of GDP	[S1]
Capital outlay on defence services	2,19,306	+21.8%	[S1]
Navy capital heads	32,496	+4%; 17.5% of acquisition	[S1]
R&D capital outlay	17,250	+15.6%	[S1]
Coast Guard	8,393	About -13%	[S1]
Shipbuilding package	69,725	Approved; 4.5 million GT capacity target	[S8]
P-75I (proposed)	About 70,000	Awaiting CCS approval, Aug 2026	[S9]
Programmes on the wish list (AoN)	About 2.35 lakh crore (Sep 2025)	74 ships; value as reported in Sep 2025	[S2]

ANALYST JUDGEMENT

The Government's push is real and rising, but it is unevenly distributed. The overall capital budget is up more than 20%, domestic share is at a record and a Rs 69,725 crore package supports shipyards. The Navy's own capital growth lags. If its share stays near 17.5%, the Navy will be asked to deliver a 230-ship fleet on a shrinking share of acquisition spending.

CHAPTER 14 | CONCLUSION

A credible Indian Ocean shield; an unfinished Indo-Pacific one

India's maritime security design is coherent. The doctrine and strategy published in 2025–26 identify the right problems: grey-zone competition, an expanding Chinese presence, chokepoint dependence, undersea vulnerability and the need for partners without alliance. The force plan is aimed at the right place: sea denial in the Indian Ocean, a sea-based deterrent now at three submarines, a surface fleet growing by a hull every six weeks, and an industrial base moving toward self-reliance. The weaknesses are equally clear: no nuclear attack submarine, thin mine countermeasures, patchy undersea awareness, an undecided carrier and theatre command, and a Navy capital share that has not kept pace with the budget.

Outlook to 2035 (Delta Doctrines projection)

Scenario	Conditions	Fleet in 2035	Subsurface	Assessment
Upside	P-75I and Project 77 sanctioned in 2026–27; contracts for 75 approved hulls signed by 2028; Navy share of acquisition restored to 21%	About 200 or more, as the Navy states	Six P-75I, two to three SSN, four SSBN	Credible denial across the Indian Ocean; partial power projection
Base	P-75I sanctioned but SSN slips; conversion of approvals continues at current pace	Roughly 175–190 (judgement)	Six P-75I arriving, SSN in trials, four SSBN	Strong in the Indian Ocean; gaps in mines and undersea sensing
Downside	Approvals not converted; budget share falls; shipyard delays; supplier shocks	Roughly 150–165 (judgement)	Old boats retire faster than new arrive	Denial thins; dependence on partners rises

Four decisions that settle the outcome

- **Sanction P-75I and Project 77** in 2026–27. These are the long-lead items; every year of delay is a year of lost deterrence in the 2030s.
- **Convert approvals to contracts**, starting with mine countermeasure vessels and the next-generation corvettes, so that construction does not fall below the level needed for the 2035 fleet.
- **Resolve the theatre question** by deciding the shape of a Maritime Theatre Command, so that force planning has a mission owner.
- **Raise the Navy's capital share** toward the 21% of acquisition it held in 2025–26, and link the Coast Guard's budget to the grey-zone mission the doctrine describes [S1][S3].

Closing judgement

India is not building a navy to defeat China or to follow the United States. It is building a navy to ensure that the Indian Ocean remains a place where India decides what happens. That aim is realistic and within reach, but it depends on decisions that are due now and results that arrive in the 2030s. The next eighteen months of contract signings, theatre decisions and budget allocations will show whether the design becomes a fleet.

> DELTA DOCTRINES ASSESSMENT
> By 2030, India will probably hold the Indian Ocean against any single adversary below the level of general war. By 2035, whether it can also contribute credibly to Indo-Pacific security depends almost entirely on whether the submarine, mine countermeasure and carrier-support programmes in this paper are contracted in the next two years.

APPENDIX | SOURCES AND METHOD

Source register, method and limitations

Tag	Source	Type / date
S1	IDSA Issue Brief, 'Ministry of Defence 2026–27 Budget Estimates: An Analysis' (Rajiv and Singh)	Think-tank, 13 Feb 2026
S2	Wikipedia, 'Future of the Indian Navy' (fleet counts, programme tables, targets)	Secondary compilation, accessed Oct 2026
S3	IDSA, 'Indian Maritime Doctrine 2025: An Assessment' (Singh and Vignesh)	Think-tank, 9 Mar 2026
S4	IDSA, 'INMSS-2026: What India's New Maritime Strategy Means'	Think-tank, 6 May 2026
S5	CRS Report RL33153, 'China Naval Modernization' (O'Rourke); ONI and DoD data	US Congress research, Apr 2025
S6	India Sentinels, 'From Gwadar to the Andamans: How China is building the capacity to challenge India at sea'; cites CSIS and the Pentagon Dec 2025 report	Press, 2026
S7	Ideas for India, 'Maritime chokepoints: India's energy and trade vulnerabilities and strategic responses'	Analysis, recent
S8	IANS, 'Rs 69,725 crore package strengthens shipbuilding and maritime financing in India'	News agency, 25 Jul 2026
S9	Marine Insight, 'India nears Rs 70,000-crore submarine deal with Germany after years of delays'	Trade press, 17 Aug 2026
S10	ThePrint, 'Indian Navy drops plans of third aircraft carrier; second IAC will replace Vikramaditya'	Press, 3 Feb 2025
S11	Drishti IAS, 'India inducts SSBN INS Aridaman'	Explainer, 4 Apr 2026
S12	StratPost, 'India, U.S. sign ten-year defence framework'	Defence press, 2 Nov 2025
S13	Business Standard, 'Theatre commands ultimate goal: Navy chief' (RAN Samwad-2025)	Press, 27 Aug 2025
S14	Naval News, Indian Navy tag page (headlines to 9 Oct 2026)	Defence press, Jun–Oct 2026
S15	idrw.org, 'Indian Navy's 2026-27 budget: 1,07,549 crore ... 50 ships under construction'	Blog; unverified
S16	Las Vegas Sun, 'Rubio's visit to India focuses on US trade tensions'	Press, 25 May 2026 (headline only)
S17	US Indo-Pacific Command, 'US, India strengthen defense ties at 22nd Military Cooperation Group'	Official release (headline only)

Method and limitations

The paper uses only open sources and does not assert any classified information. Where possible, budget data come from IDSA's analysis of the Union Budget, doctrine from IDSA's assessment of the released documents rather than the documents themselves, and force data from a public compilation. Primary documents (the Navy's doctrine and strategy texts, the Ministry of Defence's demand for grants, and contract notices) were not read directly; findings should be checked against them before external use. Fleet counts differ between sources: 'over 130' (Dec 2024), '140' (Sep 2025) and 'over 140' (May 2026) appear in the same compilation, and Navy and PLAN counts use different conventions. Figures 12, 13 and 18 and the scenarios in Chapter 14 are analyst judgements. Programme statuses are as of the dates in the sources and may have changed. Two sources (S16, S17) were seen as headlines only and are used for general context, not for specific figures.

Verification priorities before external use

Delta Doctrines recommends that readers confirm four items against primary documents: the Navy's own fleet counts and the 2035 and 2037 targets; the CCS status of P-75I and Project 77 after August 2026; the delivery status of Rafale-M; and the Navy's 2026–27 revenue allocation, which the IDSA brief does not report.