India’s Return to Rafale Jets

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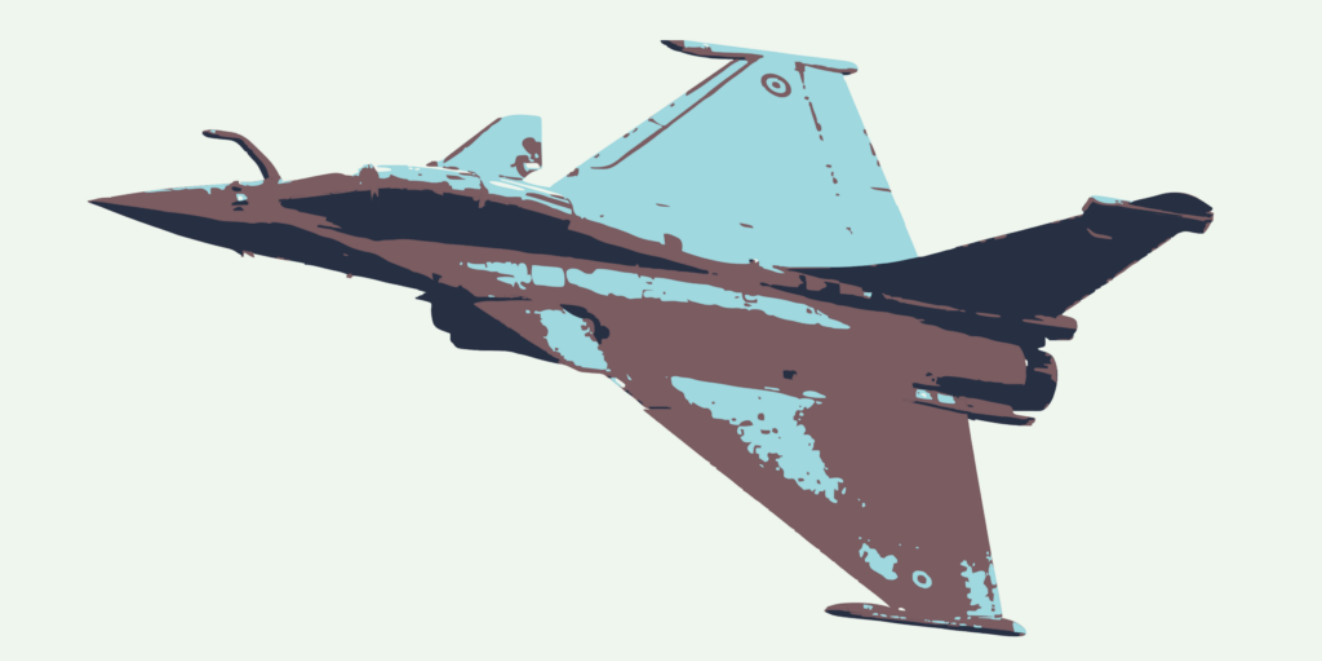

On 16 January, the Defense Procurement Board (DPB) cleared the proposal to acquire 114 Dassault Rafale multi-role fighters. The proposal is valued in media reports at about INR 3.25 lakh crore (roughly USD 35–36 billion). It includes 18 aircraft in ‘fly-away’ condition from France, while the remaining 96 will be manufactured in India with the domestic defense industry supplying key components to achieve 60% indigenous content in phases. Dassault has already committed to establishing industrial footprints in India through its already existing MRO facility in Hyderabad and the recently agreed plan for a Final Assembly Line (FAL) at the Dassault Reliance Aerospace Limited (DRAL) facility in Nagpur.

The plan also includes upgrade and life-cycle elements: the new-build aircraft are to be produced to the Rafale F4 standard, with a contractual option to migrate to an eventual F5 standard, and the IAF’s existing Rafales (currently the F3-R plus configuration with 13 India-specific enhancements) would be upgraded to the F4 level under the same program.

Indian private industry is set to play a substantial role in

the program: Tata, Mahindra, Dynamatic Technologies, and some three dozen other Indian firms are named in reporting as likely suppliers or partners. While it is already known that Tata has partnered with Dassault Systèmes to manufacture Rafale fuselages for export orders.

The decision marks the closure of a procurement loop that has remained unresolved for nearly a decade. Since the original Medium Multi-Role Combat Aircraft (MMRCA) competition collapsed and the truncated 36-aircraft Rafale deal of 2016 became mired in political controversy, India's fighter modernization plan has been characterized more by delay than resolution. In the aftermath of Operation Sindoor, with squadron numbers under visible stress and operational benchmarks sharpened by recent experience, New Delhi appears to have converged on Rafale.

The decision answers a problem of both scale and time that India has been unable to solve for more than a decade. The MMRCA competition had already identified Rafale as the natural winner in 2012. After repeated detours, the service and the government now face a sharp shortfall in combat strength, with squadron numbers falling from the sanctioned 42 to around 29. Furthermore, successive delays in indigenous projects, notably the Tejas program with the slower-than-planned rollout of follow-on upgraded versions and AMCA just being on the drawing board, mean there is no ready, large-scale alternative that can be fielded quickly enough to arrest the slide.

Second, the decision is as much about institutional learning as it is about aircraft performance. Having absorbed 36 Rafales, the IAF now has real experience with the type's logistics, training, and weaponization chains. Crucially, the aftermath of Operation Sindoor public critique painted Rafale as a controversial choice (particularly following reports that Rafale aircraft had been downed). The IAF's decision to expand the Rafale fleet nevertheless suggests that internal reviews and operational debriefs did not identify fundamental

shortcomings in the platform itself, but rather in planning, intelligence gathering, possible failure in anticipating adversary tactics, and supporting enablers. This interpretation is reinforced by the operational context in which the aircraft was used. Rafales were primarily configured for air-to-ground missions, carrying SCALP cruise missiles and HAMMER precision-guided munitions, and were not deployed for beyond-visual-range air combat, in part because Meteor air-to-air missiles were not utilized at the time. Within those parameters, the aircraft appears to have performed as intended. The follow-on purchase therefore reads as an institutional vote of affirmation by the IAF, rooted in operational assessment.

IAF bargaining power and public ire

Beyond numbers and technical confidence, the deal signals a shift in institutional leverage. The high-visibility operational successes including the IAF's role in recent cross-border strikes and the political salience of those missions (for the govt) have strengthened the service's hand when arguing for capability priorities. At the same time, the IAF leadership has become public and persistent about industrial and timeline constraints. From blunt calls to fix Tejas delivery schedules to explicit demands that private industry be brought into production (since HAL's chronic delivery and quality problems), it has shifted political calculation toward accepting the service's procurement priorities rather than delaying them or allowing other considerations to take precedence.

Despite these strategic justifications, the decision has not been insulated from public criticism. Much of the discontent on social media has focused on the high cost, perceived bureaucratic complacency, perceived sell-out of Make in India choices by 'the import lobby', and the slow pace of the procurement process. Under current timelines, deliveries of the 114 aircraft, roughly six squadrons, are expected to begin

around 2030. This coincides with the planned phase-out of the Jaguar fleet, which also accounts for about six squadrons, resulting in no net expansion of squadron strength. Compounding these concerns are reports that Pakistan is moving toward inducting Chinese fifth-generation fighter aircraft, which heighten anxieties about India's future airpower balance. Together, these factors explain the intensity of the public debate. There are enough reasons to be dismayed by the decision, but there are even fewer defensible reasons to delay or substitute the purchase without accepting a real operational risk. Hence, ongoing discontent is driven more by frustration with past inaction, accumulated over years, than by a real-time identification of more optimal alternatives.

The DPB's current nod is the first step. The file will then move to the Defence Acquisition Council for an Acceptance of Necessity (AON), followed by detailed government-to-government negotiations with France, and finally a Cabinet Committee on Security decision to sign the contract. Since IAF directly proposed this procurement, the process could be accelerated to an early signing in late 2026 or early 2027. Given that the French President has confirmed his fourth visit to India in February, a key announcement on the deal could be imminent.

A key concern to monitor is Dassault Aviation's backlog. At the end of 2025, Dassault had orders for about 220 Rafale aircraft, including 45 for the French Air Force and 175 for export customers. At its current production rate of around 25 aircraft a year, it would take 10 years to clear these orders. This makes the proposed final assembly line in Nagpur critical, as it is expected to add capacity for about 24 aircraft per year and bring total Rafale production to roughly 50 aircraft per year.

Finally, successful execution will deepen private-sector integration in India's defense manufacturing. Reliance is set to gain hands-on production experience, effectively stepping

into a role earlier envisaged for HAL during the 2014 negotiations. This exposure to final assembly and complex aerospace manufacturing could prove important for future indigenous programmes such as the Tejas Mk2 and the AMCA.