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Europe Rearms, and India's Case for Self-Reliance Sharpens

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THE LIFT LINE

When the world's biggest buyers start hoarding weapons, a country that makes its own decides its own security, and one that imports waits in someone else's queue.

WHY THIS EDITORIAL MATTERS FOR YOUR EXAM

A structural shift is under way in the global security order. Europe, jolted by war on its continent, is rearming at a pace not seen since the Cold War, and the ripple effects reach every arms importer, including India. This is a textbook case of how a distant geopolitical event reshapes a country's strategic-economic calculus, and it lets you connect international relations directly to defence economics and the self-reliance agenda. Examiners increasingly frame questions at exactly this intersection of external environment and internal capability.

GS Paper 2: the theme covers India's relations with major powers and groupings, the working of security alliances, and the doctrine of **strategic autonomy** that anchors Indian foreign policy. **GS Paper 3:** it is defence, the arms trade, **indigenisation** and the economics of a domestic defence-industrial base. For **Prelims**, hold the specifics: **NATO**, the North Atlantic Treaty Organization, was **founded in 1949** and is **headquartered in Brussels**; its members are moving toward a headline defence-spending target of around **5 per cent of GDP** in the medium term, up from the older **2 per cent** guideline; India's drive for self-reliance, **Atmanirbharta in defence**, runs through **positive indigenisation lists**, the two **defence industrial corridors** in Uttar Pradesh and Tamil Nadu, and rising **defence exports**. For **Mains**, the argument to carry is that Europe's rearmament turns a sellers' market against import-dependent buyers, which makes indigenisation and diversified sourcing a strategic necessity rather than an aspiration.

BACKGROUND AND CONTEXT

For three decades after the Cold War, Europe drew a peace dividend, letting defence budgets drift below the 2 per cent of GDP that NATO had nominally set as a floor. That era is over. War in Europe and a wary reading of American commitment have pushed the alliance to raise its ambition sharply, with members converging on a far higher spending **trajectory** over the coming decade. The stated logic is deterrence, but the immediate market effect is a surge in demand for artillery, air defence, munitions, fighter aircraft and naval platforms.

That demand collides with a defence-manufacturing base that cannot expand overnight. Production lines for munitions and complex systems have long lead times, and supply chains for critical components are concentrated. The result is a classic **sellers' market**: order books stretch out for years, prices rise, and manufacturers prioritise their own governments and closest allies. For a country like India, which has historically been among the world's largest arms importers, this is a warning about the reliability and cost of buying security off the shelf.

THE CORE ARGUMENT / ISSUE

The sellers' market squeezes buyers

When the biggest and best-funded buyers are also home to the manufacturers, an importer's **leverage** collapses. Delivery timelines lengthen, spare-parts pipelines get crowded, and the price of every imported platform climbs. Dependence on a narrow set of suppliers also imports their political constraints, sanctions, end-use conditions and export controls, into India's own readiness.

Self-reliance as the durable hedge

India's answer, consistent with the Government's stand, is to build at home. The positive indigenisation lists progressively bar the import of specified items, forcing domestic development. The defence corridors aim to cluster private and public manufacturing. Defence exports have climbed to record levels, a sign that the base is maturing from assembly toward genuine design and production. Self-reliance does not mean **autarky**; it means holding the design authority and production capacity for critical systems so that supply is not hostage to another capital's politics.

Diversification as insurance

Where import remains necessary, spreading sources across partners reduces single-point dependence and preserves strategic autonomy, letting India keep options open rather than align its supply chain with any one bloc.

LEVER	WHAT IT DOES	STRATEGIC PAYOFF
Positive indigenisation lists	Progressively bar import of named items	Forces domestic design and production capacity
Defence corridors (UP, Tamil Nadu)	Cluster private and public manufacturing	Builds an ecosystem, jobs and supply resilience
Rising defence exports	Turn the base outward-facing	Signals maturity; funds scale and R and D
Diversified sourcing	Spread residual imports across partners	Preserves strategic autonomy; cuts single-point risk

HOW TO THINK ABOUT THIS (ANALYTICAL FRAME)

Frame this as supply-chain security applied to national defence. In any market, when demand spikes and supply is concentrated, the price-taker suffers most; the way out is to become a price-maker by producing your own. Apply the lens of dependence and leverage: for each capability, ask who controls design, who controls production, and who controls spares. If the answer to all three is a foreign supplier now stretched by its own war economy, that capability is a **vulnerability**. Self-reliance shifts those answers home. Strategic autonomy is not a slogan but the practical ability to act without waiting in another country's queue, and Europe's rearmament is precisely the stress test that reveals where India still waits.

THE DIAGRAM IN WORDS

War in Europe -> NATO targets ~5% of GDP defence spending -> global arms demand surges -> concentrated supply -> sellers' market (longer waits, higher prices) -> import-dependent India squeezed -> response: indigenisation lists + defence corridors + diversified sourcing -> self-reliance -> strategic autonomy

WAY FORWARD

- ① **Deepen design-led indigenisation:** move beyond licensed assembly to owning the intellectual property and production of critical systems, so that indigenisation lists translate into genuine capability rather than relabelled imports.
- ② **Scale the private defence ecosystem:** use the defence corridors, assured order books and a stable procurement calendar to give private firms and MSMEs the confidence to invest in long-gestation manufacturing.
- ③ **Build strategic stockpiles and spares:** insulate readiness from global supply shocks by holding buffers of munitions and critical components while domestic lines ramp up.
- ④ **Diversify residual imports and co-develop:** spread remaining purchases across partners and pursue joint development and technology transfer, keeping strategic autonomy intact while accelerating the learning curve.

PYQ LINKAGE AND PRACTICE

This connects to the 2023 GS3 question on the achievements of indigenisation of technology and self-reliance in defence, the 2018 GS3 question on the impact of a country's foreign policy on its neighbours through defence and trade, and recurring GS2 questions on strategic autonomy and India's relations with major powers.

Practice question: As Europe rearms and the global arms market tightens into a sellers' market, self-reliance in defence becomes a strategic necessity for India. Discuss, with reference to indigenisation policy and diversified sourcing. (250 words, 15 marks)

Sources: The Indian Express, Ministry of Defence, Government of India, PIB

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