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# Decoding DPM 2025

*India's Development Priorities*



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This roughly governs Rs. One Lakh Crore of annual revenue procurement by the three Services and MoD Organisations.



## Executive Summary

The Defence Procurement Manual (DPM) 2025 is a revision of DPM 2009 which instates the rule for revenue procurement (spares, repairs, MRO, ICT, services).<sup>1</sup> The DPM 2025 came into force on 1st November 2025.<sup>2</sup> This roughly governs Rs. One Lakh Crore of annual revenue procurement by the three Services and MoD Organisations.<sup>3</sup>

DPM 2025 is divided into two volumes:<sup>4</sup>

Volume I- This highlights the principles, procurement methods, delegated authorities, contract rules and new inclusion of Indigenisation and Innovation, ICT procurement, and Consultancy/Services. Volume II- It emphasizes the operational tools that are required- standard forms, templates, certificates, and appendices making the implementation of Volume 1 stronger.

Integrating Volume I and Volume II are designed to speed up decisions by federalising the powers, reduce punitive risk on developers, provide demand certainty via confirmed multi-year deal of indigenous items and open revenue procurement to private industry, MSMEs and startups by simultaneously managing transparency and audit requirements.





### *Defence Assests*

**In terms of defence procurement, the primary model followed by India until now has been capital acquisition. Which meant the focus was solely on the purchase of physical defence assets such as fighter jets, submarines, UAVs, artillery systems, etc.**



## Why Defence Procurement Reform Matters for Industry

It will act as a crucial component of industrial policy rather than an administrative process like its predecessor.

In terms of defence procurement, the primary model followed by India until now has been capital acquisition.<sup>5</sup> Which meant the focus was solely on the purchase of physical defence assets such as fighter jets, submarines, UAVs, artillery systems, etc. Thus, we always saw our defence capability in terms of the number of jets or tanks the country had. However, one crucial aspect that used to go unaddressed was revenue procurement.<sup>6</sup>

Revenue procurement goes beyond mere acquisition; it focuses on the operational readiness of these assets. Thus, it includes the continuous acquisition of spares, repairs, maintenance costs, updating software, and providing logistical support, all complementary activities that directly impact the defence capability and readiness of a country.

Therefore, the DPM 2025 brings a change in this mentality. It updates the rules of revenue procurement, which were last established in 2009. It addresses several shortcomings of DPM 2009 while also increasing its budget to an estimated amount of Rs. 1 lakh crore for the financial year 2025-26.<sup>7</sup> The DPM 2025 also aims at opening up this domain to private entities and investments, which will act as a game-changer for the Indian defence industry. It will act as a crucial component of industrial policy rather than an administrative process like its predecessor.

Moreover, the DPM 2025 also attempts to incorporate India's self-reliance agenda and capitalize on the defence startups that have started coming up in India.





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### *Atmanirbhar Bharat*

Over the last decade, policy initiatives such as Atmanirbhar Bharat, the growth of defence industrial corridors, and innovation schemes like iDEX have caused a structural change in the Indian defence industrial ecosystem.



Over the last decade, policy initiatives such as Atmanirbhar Bharat, the growth of defence industrial corridors, and innovation schemes like iDEX have caused a structural change in the Indian defence industrial ecosystem.<sup>8</sup> It has created a conducive environment for an explosion in the number and diversity of firms that are now competing for these defence contracts.

The DPM 2025 thus must be seen as a response to the mismatch that had appeared between the now much-advanced industrial capability and the outdated, risk-averse, and often rigid procurement rules. The government can expect this reform to improve the predictability of demand, reduce the transaction costs, and better integrate the Indian industry into the defence ecosystem. For industries, this reform signals the start of a new era as it brings new opportunities to their doorstep.





### *Modern Warfare*

**Modern-day warfare has evolved and requires that the Army, Navy, and Air Force function in unison along with the allied organisations of the Ministry of Defence.**



## What is DPM 2025? Structure and Scope

Modern-day warfare has evolved and requires that the Army, Navy, and Air Force function in unison along with the allied organisations of the Ministry of Defence.

The Defence Procurement Manual 2025 acts as the principal regulatory document that governs revenue procurement by the Indian Armed Forces. Capital acquisitions, however, are not a part of the manual and are instead under the Defence Acquisition Procedure (DAP). Therefore, both DAM and DAP are essential in ensuring the readiness and capability of the Indian armed forces, while the DAP pertains to what is bought, DPM covers how it is sustained.<sup>9</sup> While the DAP 2025 is set to work as a single framework, it has been published as 2 volumes.

The DPM Volume I talks about the policy principles, procurement methods, and procedures that are to be followed. Modern-day warfare has evolved and requires that the Army, Navy, and Air Force function in unison along with the allied organisations of the Ministry of Defence. The DPM 2025 standardizes procurement across all three services. Volume I consists of 14 Chapters out of which 3 chapters, namely: Chapter 10- Promoting Self-reliance through Innovation and Indigenization, Chapter 11- Information and Communication Technology (ICT) Procurement, and Chapter 12- Consultancy and Non-consultancy Services, stand out as new additions as compared to DPM 2009.<sup>10</sup>

Meanwhile, DPM Volume II is set to serve as the procedural backbone of this framework. It consists of the details on standardised forms, certificates, checklists, and government orders that have been referenced in the first Volume. For Industries, it is Volume II that is critical because it clearly lays out the compliance requirements, the documentation burden, and the ease of doing business and participation in tenders.

MoD has laid special emphasis on the need to read the two volumes together as Volume I sets the intent and policy direction that has been updated under DPM 2025, and Volume II aims at addressing the long-standing concerns of ambiguity and interpretation in the manual.





*DPM 2025*

**DPM 2025 made an amendment to the multi-year order which can be extended up to five years or more for indigenous products.**





## What Changed Compared to DPM 2009?

DPM 2025 made an amendment to the multi-year order which can be extended up to five years or more for indigenous products.

The Defence Procurement Manual 2009 dominated by public sector undertakings, which led to minimal scope for private participation. Therefore, industries highlighted the Defence Procurement Manual framework lacked rapid growth, and the same was slow, rigid and poorly aligned to growth of India's industrial policy.<sup>11</sup>

DPM 2025 introduced several amendments to the previous framework,

**A.** The DPM 2025 acknowledges the growing capability of software driven advancements to modern military capabilities. Therefore DPM 2025 compartmentalizes between hardware, ICT systems and services. It aligns to the contemporary operational requirements delineating from the scope of revenue procurement.<sup>12</sup>

**B.** The decentralised decision making power, financial powers and higher thresholds for Limited Tender Enquiries (LTE) rapidly reduces delays, procurement of critical items where as in DPM 2009 the power.<sup>13</sup>

**C.** DPM 2025 made an amendment to the multi-year order which can be extended up to five years or more for indigenous products.<sup>14</sup>

**D.** There are fundamental restructures made in the penalty regime. Liquidated damages are capped at 10% of contract value, and for indigenisation projects, penalties are reduced to 0.1% per week, compared to 0.5% under earlier rules.<sup>15</sup>

**E.** Mandatory NOCs from monopoly suppliers have been removed which has expanded the competition and reduction of administrative gatekeeping.



HAL

**The Ministry of Defence signed contracts worth Rs.62,700 with Hindustan Aeronautics Limited (HAL) for the supply of 156 indigenously designed Light Combat Helicopters (LCH) Prachand.**

***Volume I: Policy Changes with Direct Industry Impact***

The DPM 2025 Volume I has been designed to rebalance the cost of risk, improve the demand visibility, and also incentivise domestic innovation to boost self-reliance. These changes impact how the industry will be engaging with the government in terms of defence procurement.

The major policy shift can be seen in terms of the approach; while DPM 2009 focused more on procedural compliance and cost minimisation, DPM 2025 has taken an industry-facing approach, which takes into consideration the constraints that the Indian firms face. Therefore, with DPM 2025, there is an attempt to shift from a purely transactional contracting-based relationship to a more long-term relationship aimed at capacity development and sustainment.

A central pillar of this approach is prioritising the procurement of Indigenous Content (IC) at around 50%. This requirement aligns well with the broader indigenisation policies undertaken by the Government of India in order to improve upon the supply-chain localisation, enable vendor development, and ensure better technology absorption.

The operationalisation of these indigenisation requirements can already be seen across major defence procurement deals in 2025. The Ministry of Defence signed contracts worth Rs.62,700 with Hindustan Aeronautics Limited (HAL) for the supply of 156 indigenously designed Light Combat Helicopters (LCH) Prachand. The plan of meeting this demand goes over several years and is said to require the involvement of over 250 domestic suppliers, including MSMEs, with the goal of achieving more than 65% indigenous content in the final product.

Additionally, the Indian Army has placed orders worth over Rs.5000 crores to acquire indigenously developed drones. This includes UAVs and systems that have been designed and followed rigorous trials domestically. During the trials, Munitions India Limited was able to secure contracts worth Rs.500 crore from the Indian Army.





### *Towards Indigenisation*

**In 2024-25, the MoD signed 193 defence contracts worth Rs. 2.09 lakh crores, out of which 92% were awarded to domestic firms**



In 2024-25, the MoD signed 193 defence contracts worth Rs. 2.09 lakh crores, out of which 92% were awarded to domestic firms and over 3,000 indigenous items featured on the government Positive Indigenisation Lists, suggesting that the localisation under focus in DPM 2025 is not just a policy rhetoric but an emerging procurement reality. Some of the other changes in DPM 2025 are as follows.

***A. Rationalised Penalties and Risk Allocation***

One major policy change has been the rationalization of liquidated damages (LD). The LDs have now been capped at 10% of the contract value and have also been reduced to 0.1% per week for indigenization projects, which earlier stood at 0.5% per week of delay. Thus, this suggests a shift towards a risk-sharing approach of the government rather than just penalising any ambitious projects.

***B. Assured Orders and Demand Certainty***

DPM 2025 is set to establish assured multi-year orders for indigenous projects for up to 5 years or more. This is aimed at addressing the industry concern pertaining to demand uncertainty. Thus, improving and even incentivising investment planning and capacity utilisation for MSMEs.

***C. Indigenisation and Innovation***

A new chapter has been dedicated entirely to Promoting Self-reliance through Innovation and Indigenization. The MoD has already procured 43 assets worth over Rs. 2,400 crore from the MSMEs and various startups. This aligns well with the Indian policy of Atmanirbharta or self-reliance.

***D. ICT and Services Procurement***

A dedicated chapter on ICT Procurement and other services is to acknowledge the growing prominence and role of software, data, and consultancy in modern warfare, which is constantly evolving.





*Reforms In Practice*

**For industries, significantly for MSMEs, first time defence suppliers, the primary barrier to entry is procedural clarity.**



***Volume II: Why Procedural Details Matter for Industry***

Volume II Highlights if the reforms are usable in practice. It includes the government orders, checklists, certificates, appendices, and standardized forms needed to implement procurement procedures throughout the armed services.

For industries, significantly for MSMEs, first time defence suppliers, the primary barrier to entry is procedural clarity. In the earlier framework, compliance cost and bid rejections were seen due to inconsistent documentation requirements, and discretionary interpretation of rules. Volume II addresses these discrepancies by suggesting uniform tender, technical evaluations, commercial bids, PAC certifications and contract managements.

The uniformity of the above has three distinct effects: Firstly, it reduces transaction costs by allowing firms to prepare compliant bids which does not require extensive legal interpretation. Secondly, by enabling faster evaluation and contract finalisation, it accelerates procurement timelines Thirdly, auditability and legal defensibility is enhanced by reducing disputes and delayed execution.



### *Sector-Wise Impact*

**Volume II imposes strict requirements of documentation and security compliance which underscores the ease of entry is balanced by high accountability.**

The reduced barriers, liquidated damages and confirmed orders lower entry risk as well as standardised procedures reduce compliance uncertainty.



## Sector-Wise Impact on Indian Industry

### **A. OEMs & Defence Public Sector Undertakings (DPSUs)**

DPM 2025 emphasises on lifecycle support and sustainment from one-time capital sales for large OEMs and DPSUs. Streamlining revenue procurement creates long term MRO, spares and systems-integration contracts. But, the removal of procedural monopolies results in the creation of pressure from the private firms, which requires DPSUs to improve efficiency, service delivery and cost competitiveness.

### **B. Electronics, ICT and Software Firms**

Modern defence capability integrates the capability of cybersecurity, software firms which helps in procuring a systematised network systems, secure communications and data services. However, Volume II imposes strict requirements of documentation and security compliance which underscores the ease of entry is balanced by high accountability.

### **C. MSMEs and Startups**

The reduced barriers, liquidated damages and confirmed orders lower entry risk as well as standardised procedures reduce compliance uncertainty. The innovation schemes- iDEX under MoD has managed to gather around 43 items for over 2,400 crores from startups to MSMEs.





### *Economic Improvements*

**The major economic improvements linked to DPM 2025 would materialize in investment behaviour and employment.**



## Market, Investment and Employment Implications

The policy change can also be linked to a positive change in the defence stocks' behaviour due to an expected stable and continuous revenue stream.

The major economic improvements linked to DPM 2025 would materialize in investment behaviour and employment. The policy change can also be linked to a positive change in the defence stocks' behaviour due to an expected stable and continuous revenue stream. Unlike the capital acquisitions under DAP, which are often characterized as lumpy and politically contingent, the revenue procurement is better at offering predictability to the investors.

For firms and industries, the predictability is what ensures cash flow stability and therefore enabling long term capital investment. This is particularly relevant for industries such as MRO providers, shipyards, and electronics firms whose business models rely on the continuous and efficient utilisation of skilled labour and infrastructure.

What the policy shift is also expected to impact is employment. The revenue procurement process, which is inherently labour-intensive due to its components like maintenance, repairs, and services related to software and logistical support, all demand sustained flow of workers that are skilled or semi-skilled. Thus, creating predictability even in the hiring cycle. Therefore, DPM 2025 is also set to improve and work on the objectives of job creation and industrial capacity building.

DPM 2025 impacts the Revenue Procurement contracts which deals with sustaining military platforms after acquisition. The contracts include maintenance, repairs, and overhaul (MRO), spares and components, ICT systems, software support, logistics, and special services. Therefore, DPM 2025, does not impact any deals that involve purchasing of fighter aircrafts, submarines,, tanks or missile systems which is majorly governed by Defence Acquisition Procedure.





### *India's Ambition*

**DPM 2025 implications have emerged vital for India's ambition to emerge as a global hub for defence manufacturing, sustainment and services.**



### ***DPM 2025 Integration into Global Defence Supply Chain***

DPM 2025 implications have emerged vital for India's ambition to emerge as a global hub for defence manufacturing, sustainment and services. Through distributed global supply chains, modern defence production is organised under which component manufacturing, assembly, MRO, software supports and upgrades are diversified across multiple nations. Predictable, lifecycle-oriented revenue procurement frameworks stand as the central focus for participation.

By reforming revenue procurement, it aligns with DPM 2025 India's procurement practices with global norms followed by major defence economies. Assured multi-year orders, rationalised penalties, and standardised contracting procedures, by these provisions, reduces the chances of uncertainty for Indian firms and foreign OEMs seeking long-term partnerships in India. It is encouraged to have joint ventures, technology transfer and localisation which enable Indian firms to integrate into the global production chain beyond being the centre for final assembly point.

Regional MRO and sustainment hubs are included in DPM 2025. 15% growth-of-work clause in ship refits and aviation overhaul contracts which improves India's capacity to maintain complex as well as long term maintenance tasks.

The procedural standardisation included in Volume II increases the compliance, traceability and contractual transparency which stands vital for cross-border defence cooperation and export participation. Under DPM 2025, it has enabled framework for India's integration into global defence supply chains under sustainment, electronics, ICT and services.





### *Implementation Challenges*

The payment delays too remain a major and persistent concern for the MSMEs as it directly impacts their working capital and risk appetite.



## Risks, Gaps and Implementation Challenges

Without these, DPM 2025 risks becoming yet another under-realised reform with good and noble intentions but unaddressed practical restraints.

The DPM 2025 is not devoid of limitations and implementation challenges. There exists a potential implementation gap, wherein there exists a risk of misuse of these relaxed rules. In an effort to ensure transparency and genuine competitive bidding, the uneven interpretations and capacity constraints could dilute the intended benefits.

The payment delays too remain a major and persistent concern for the MSMEs as it directly impacts their working capital and risk appetite. DPM 2025 lacks substantive focus on financing mechanisms; there exists a need for complementary reforms.

The structural tension between speeding up procurement and maintaining audit compliance is important to address. Otherwise, the unintended consequences of this imbalance would reverse the growth that the government wants to achieve with DPM 2025. Moreover, the overly cautious implementation could adversely impact the efficiency gains, while the proposed decentralisation produces oversight concerns that should be addressed at the earliest.

Therefore, the success of DPM 2025 will not be defined by policy design and ambitions alone, but instead on the institutional capacity, a consistent interpretative practice, and reliable financial support mechanisms. Without these, DPM 2025 risks becoming yet another under-realised reform with good and noble intentions but unaddressed practical restraints.





### Security

The current framework has the potential to take India's defence industry ahead as a resilient, innovation driven partner in national security rather than focusing on peripheral suppliers.

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## Conclusion

The Defence Procurement Manual 2025 is a structural shift in India's procurement framework by amending revenue procurement as an instrument of industrial policy rather than the previous administrative process. The division of the same into Volume I and Volume II, it improves demand predictability, rebalances contractual risk, lowers the procedural barriers for startups, MSMEs, and other firms.

DPM 2025 classifies sustainment, indigenisation, ICT and services with procurement rules which aligns with defence expenditures with long term investment, domestic growth, employment creation and increase in domestic supply-chain.

The current framework has the potential to take India's defence industry ahead as a resilient, innovation driven partner in national security rather than focusing on peripheral suppliers.





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**Pillars  
*of* CREATION**

For a Distinctly Indian Take on World Affairs



# Pillars *of* CREATION

The logo for Geostrata, featuring the word "GEOSTRATA" in white, uppercase, sans-serif font, with a small globe icon replacing the letter "O". It is set against a solid blue rectangular background.

GEOSTRATA

For a Distinctly Indian Take on World Affairs

The Geostrata, with a commitment to fostering a comprehensive understanding of global dynamics and thereby promoting a distinctly Indian take on world affairs, has structured its expertise into distinct pillars of creation. These pillars represent a synthesis of profound research, informed perspectives, and proactive engagement in each domain.

In our "Strategic Studies" division, we delve into critical issues ranging from national security challenges, such as aerospace threats and terrorism, to focused areas like maritime and cybersecurity. Recognizing the pivotal role of international relations, our "Diplomacy" pillar spans geographic-specific desks, ensuring we maintain a nuanced perspective on global interactions.

Our commitment to sustainable futures is evident in our "Environment" section, where we tackle everything from energy security to biodiversity conservation. Meanwhile, the "Trade and Development" segment ensures a comprehensive understanding of both global trade dynamics and intricate nuances of India's economic sectors.

The "History and Culture Desk" stands as a testament to our belief in the importance of understanding our past, rich cultural heritage, and linguistic diversities. With the rapid advancements in the technological sphere, our "Science and Technology" division remains at the forefront, analyzing developments from nanotechnology to AI.

Acknowledging the intricate weave of governance, our "Politics and Law" pillar delves deep into domestic and international legal frameworks and political landscapes. Similarly, the "Infrastructure" section focuses on the bedrock of urban and rural landscapes, ensuring we remain informed about key developmental facets.

Our endeavor to remain at the cutting edge is further cemented with our "Space Desk," where space exploration and technology come to the forefront. Lastly, our additional centers like the "Problem Identifier Center" and "Graphics Innovation Center" underscore our commitment to innovation, risk management, and holistic analysis.

Together, these pillars underscore The Geostrata's unwavering dedication to understanding and interpreting the world in its multifaceted complexity.

**Team Pillars of Creation**



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