COMMENTARIES

Beyond Symbolism: Modi’s 2026 Israel Visit and the Consolidation of an India–Israel Capability Partnership

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EXECUTIVE BRIEF & KEY FINDINGS

Prime Minister Narendra Modi's visit to Israel in 2026 is likely to be interpreted primarily through symbolism: a regional signal, a referendum on bilateral ties, or an extension of leader-level rapport. Such readings obscure the more consequential driver of the relationship. By 2026, India’s partner selection is increasingly governed by capability outcomes and industrial resilience rather than diplomatic optics. The analytically relevant question is whether India and Israel can consolidate a shift from procurement-driven defence ties to a capability partnership anchored in co-development, co-production, resilient supply chains, readiness, and institutional depth.

This transition has acquired urgency because both countries have operated under acute security pressure in recent years, Israel in a prolonged war and India in a post-2025 environment shaped by the lessons of Operation Sindoor. The solidarity observed under these conditions was not anomalous; it reflected the longer Modi-era trajectory of normalised, interest-based cooperation that deepens pragmatically without converging into a formal alliance.

Accordingly, the significance of a 2026 visit would be measured less by public messaging than by mechanisms: domestic production pathways inside India, modular IP and technology-transfer arrangements, joint MRO and training ecosystems, and a security-and-delivery package for IMEC focused on continuity under stress.

1. Analytical Frame: Why Optics Mis-specifies the Problem

A Modi visit to Israel in 2026 should not be interpreted as India “choosing sides” in the Middle East, nor as a proxy for leader-to-leader affinity. India’s strategic practice is characterised by issue-based coalitions and risk management rather than bloc alignment. New Delhi ranks interestsenergy security, economic growth, resilience, and deterrence and builds overlapping partnerships accordingly.

On this basis, the appropriate evaluative metric is practical rather than performative: can both sides translate political comfort into industrial and operational depth?

2. Shared Fate Under Stress: Solidarity as a Continuation, Not an Exception

A salient yet under-analysed feature of contemporary India–Israel relations is the emergence of a shared security logic shaped by operating under pressure. Over the past two years, Israel has confronted a prolonged war, generating sustained demands for continuity, resilience, and rapid adaptation. India, meanwhile, has internalised post-2025 lessons regarding limited conflict, escalation management, deterrence signalling, and the integration of kinetic action with narrative and diplomatic instruments in the wake of Operation Sindoor.

Partnerships tend to deepen most rapidly when states recognise that they face comparable categories of challenge: terrorism and coercion, drones and loitering munitions, information warfare, and the need to sustain critical national systems under stress. From this perspective, mutual expressions of support and practical assistance should be viewed as the logical continuation of the Modi-era trajectory of normalising Israel as a strategic partner quietly, interest-first, and operationally.

Importantly, shared fate does not imply ideological alignment. It refers to a convergence of security problems and a growing belief that each side’s experience can be translated into transferable capability advantages.

3. Three Misreadings to Avoid

To assess the strategic meaning of a 2026 visit, three common misreadings should be retired: (1) Warmth does not equal alliance. Modi’s personal diplomacy is a tool for building momentum with strategically useful partners; it is not a substitute for codified commitment.(2) Deeper cooperation does not imply bloc alignment. Even as defence cooperation expands, India will avoid the language and obligations of formal alliance behaviour.(3) Engagement with Israel does not imply “choosing Israel over the Gulf.” India will continue to manage overlapping relationships with Israel, the UAE, and Saudi Arabia through interest-ranking, hedging, and de-risking.

4. The Structural Driver: India’s Industrial Turn and the Centrality of Domestic Production

The most consequential shift in India’s defence policy is structural and industrial: from acquisition to absorption, from procurement to production, and from import dependence to ecosystem construction. India’s objective is not merely to purchase advanced capability; it is to own the capacity to sustain, regenerate, and upgrade capability under crisis conditions.

This is where India–Israel defence ties must evolve. Israel’s value proposition cannot remain limited to delivering high-performance systems quickly. It must increasingly centre on capability acceleration inside India through Indian

production lines, Indian maintenance and sustainment nodes, Indian software support, and the diffusion of tacit operational knowledge to Indian organisations.

4.1 Israeli recognition of the production constraint

A critical enabling condition is that Israel appears to understand the constraint. The Israeli defence ecosystem has shown growing awareness that India's ceiling for external vendors is political-economic as much as strategic. To remain relevant, cooperation must be designed around India's domestic production imperatives rather than positioned against them. The strategic logic is straightforward: if the relationship is framed primarily as exports, it will encounter a ceiling; if it is framed as an industrial partnership, it becomes both more scalable and harder to reverse.

4.2 Indian flexibility and recognition of Israel's distinct value

India, for its part, also appears to recognise Israel's distinct value proposition. Where major suppliers often offer scale, Israel often provides what ecosystem-building requires: systems integration expertise, a culture of iterative upgrades, and the ability to translate operational lessons into rapid capability adaptation. This helps explain why New Delhi has incentives to be flexible where possible on models of cooperation, on implementation pathways, and on structuring arrangements so domestic production goals can be met without sacrificing performance and speed.

In short, India's self-reliance trajectory does not diminish Israel's relevance; it redefines it.

5. Operational Domains for a Capability Partnership

A capability partnership requires prioritising domains where co-development and co-production are strategically rational and where Israel's strengths align with India's absorption goals.

5.1 Integrated Air and Missile Defence: Architecture Over Stovepipes

India's central challenge is not only acquisition but integration: layered architectures, sensor fusion, command-and-control, and doctrinal coherence that avoids stovepiped systems. Israel's comparative advantage lies in architecture thinking, battle management, and iterative upgrade cycles especially when paired with Indian production, MRO, and software sustainment. This is the distinction between purchasing a system and operating an evolving defence enterprise.

5.2 Counter-UAS as Readiness Infrastructure

The drone and loitering munition challenge has become a readiness problem rather than a niche technology issue. India's requirement is inherently layered: detection, identification, electronic warfare, kinetic intercept, and scalable procedures across terrain and border conditions. This domain is well-suited to joint development and production because it rewards rapid iteration, local manufacturing capacity, and continuous upgrades.

5.3 ISR, Sensors, EO Payloads, and Autonomy: Decision Advantage Under Stress

Modern deterrence and warfighting increasingly depend on persistent ISR, precision targeting, and decision advantage. Israel's contribution is not only sensor technology, but operational integration: how ISR connects to targeting cycles, how autonomy reduces manpower burdens, and how systems remain effective in contested environments. These attributes can be institutionalised through joint development paired with Indian sustainment.

5.4 Cyber and Critical Infrastructure Protection: Making the Partnership Structural

Cyber and infrastructure protection is where the relationship can become structurally embedded. India's digital expansion and critical infrastructure exposure are accelerating simultaneously. Israel has deep expertise in protecting high-value nodes—ports, energy, and communications while translating threat intelligence into resilient architecture. This connects directly both to India's resilience agenda and to IMEC's corridor logic.

5.5 Defence Industrialisation: Modular IP, ToT Pathways, MRO, and Training Ecosystems

Israel's strategic opportunity is to propose frameworks that respect India's core demand: build capacity inside India. This implies clear co-production pathways, modular IP arrangements, MRO and sustainment nodes, and training ecosystems that embed tacit knowledge within Indian organisations. A mature partnership is measured by how quickly India can maintain, upgrade, and iterate—without dependence on external supply chains.

6. IMEC as a Security-and-Delivery Project

For defence planners, IMEC should be treated as more than a connectivity slogan. A corridor constitutes a chain of vulnerabilities ports, rail, communications, energy links, and logistics platforms susceptible to physical, cyber, and financial disruption. India's calculus is functional: reliability under volatility, insurability at scale, credible cyber-physical protection, and the capacity to deliver under crisis conditions.

Israel's challenge is less intent than packaging. To be operationally credible, Israel should present an IMEC Security and Delivery Package: baseline standards, cyber protection for communications and energy layers, port security architecture, disruption drills, and mechanisms that reduce risk premiums. Israel's comparative advantage is distinctive here: critical infrastructure defence expertise, cyber depth, and an operational planning culture.

7. Boundaries and Constraints

A mature India–Israel defence discussion requires clarity on boundaries: No alliance commitments. India will not trade strategic autonomy for symbolism.Caution with the Gulf. India will continue balancing relationships due to energy security, diaspora realities, and economic strategy. Domestic sensitivities. India will prefer quiet institutional depth over public diplomatic theatre.

8. Policy Recommendations: Six Practical Moves

1. Establish an India–Israel Defence Industrial Working Group mandated for co-production, MRO, and supply-chain resilience, with timelines and industry participation.

2. Launch a focused Joint R&D track prioritising counter-UAS, layered air defence interoperability, sensor fusion, and cyber for critical infrastructure.

3. Propose an IMEC Security and Delivery Package designed to reduce corridor friction and lower risk premiums.

4. Develop a Port-to-Protection plan around Haifa, including scenario exercises, disruption drills, and cyber-physical protection architecture.

5. Build talent and training pipelines connecting academia, industry, and defence institutions to embed tacit knowledge and create ecosystem lock-in.

6. Maintain a disciplined public posture, with public-diplomatic coordination that respects India's sensitivities and avoids unnecessary political noise.

9. Conclusion

A Modi visit in 2026 should be assessed through capability rather than optics: can Israel help India build resilient defence capacity in ways that India can absorb, scale, and sustain—while India, in turn, preserves Israel's role by exercising flexibility where possible within its domestic production imperatives?

The opportunity is substantial, but it requires a shift from messaging to mechanisms, from transactions to systems, and from headline diplomacy to industrial and operational depth. In 2026, the key question will not be whether the partnership is "warm," but whether it is productive, scalable, and resilient under stress.

The views expressed are those of the authors and do not represent the views of CNAWS.

Image Source: Government Press Office, Israel