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MODI IN ISRAEL: INTELLIGENCE AND SECURITY ALIGNMENT IN A REGIONAL CRISIS



CORE GROUP

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KEY JUDGMENTS

KJ-01 **HIGH CONFIDENCE**

Prime Minister Narendra Modi's February 26 visit to Israel formalizes a structural shift in Indian foreign policy. India is moving from its historical Non-Aligned posture toward direct defense and intelligence integration with Tel Aviv.

KJ-02 **HIGH CONFIDENCE**

The visit coincides with the third round of Geneva nuclear negotiations and a major US military buildup (USS Gerald R. Ford deployment, F-22 stationing in Israel). This timing signals an unambiguous Indian alignment with the US-Israeli security architecture at a critical regional juncture.

KJ-03 **HIGH CONFIDENCE**

Bilateral cooperation exceeds transactional arms procurement. Joint development of systems (Barak-8) and deep Israeli penetration into India's SIGINT and cyber infrastructure (via Unit 8200 alumni firms) create a durable operational dependency.

KJ-04 **HIGH CONFIDENCE**

This alignment degrades India's strategic relationship with Iran and compels Pakistan to offset the RAW-Mossad partnership through enhanced intelligence cooperation with China and Turkey.

I. TIMELINE

- **July 2017:** Modi visits Israel—the first Indian Prime Minister to do so. He tours Yad Vashem but omits a corresponding visit to Ramallah, breaking traditional Indian diplomatic protocol.
- **January 2018:** Netanyahu visits India—the first visit by an Israeli Prime Minister in 15 years. The states sign nine cooperation agreements covering defense, cybersecurity, and space.
- **2018–2022:** Accelerated arms procurement: Spike ATGM, Heron and Harop drones, SPYDER systems, and joint development of the Barak-8 naval air defense system. Israel becomes India's third-largest arms supplier.
- **2023:** A formal Memorandum of Understanding establishes cooperation in cybersecurity and counter-terrorism. The joint India-Israel Industrial R&D and Technological Innovation Fund (ITIF) activates.
- **7 October 2023:** Hamas attack. India issues an explicit, unreserved condemnation—a sharp departure from its traditional balanced posture. It is highly probable that Modi received a prompt intelligence briefing from Israeli channels.
- **2024:** Expanded cooperation on loitering munitions and Israeli combat doctrine transfer. Unconfirmed reports emerge of joint intelligence tracking of Iranian networks in South Asia.
- **25 February 2026:** Modi arrives in Israel, received personally by Netanyahu. Al Jazeera reports sharp internal Indian criticism regarding support for Israel.
- **26 February 2026:** Yad Vashem tour. Modi delivers a speech explicitly linking Indian and Israeli security interests. The visit coincides with the start of the Geneva 3 round and escalating US military mobilization.

II. PARTIES AND IDENTITIES

A. Indian Side

- **Narendra Modi** — Prime Minister. Has driven India's strategic repositioning toward Israel since 2014. His Bharatiya Janata Party (BJP) operates on a Hindu nationalist platform lacking the historical commitment to the Palestinian cause characteristic of the opposition Congress party.
- **Research and Analysis Wing (RAW):** India's external intelligence agency. The operational relationship with Mossad accelerated significantly post-2014.
- **Ministry of Defence / DRDO:** The technical partners utilizing Israeli technology transfers and joint development projects to bypass constraints imposed by other global suppliers.

B. Israeli Side

- **Benjamin Netanyahu** — Prime Minister. Faces internal judicial pressure (the "midnight meeting" case) and utilizes the Indian partnership to project diplomatic strength. His personal relationship with Modi is well-documented.
- **Mossad:** Coordinates with RAW on counter-terrorism and HUMINT. Recurrent reporting indicates operational coordination against Pakistani and Kashmiri networks.
- **Defense Industries:** Rafael, Elbit Systems, and Israel Aerospace Industries (IAI) maintain active Indian contracts exceeding \$15 billion since 2000.
- **Unit 8200 / Cyber Ecosystem:** Signals intelligence veterans operating commercial cyber firms (NSO Group, Check Point, CyberArk) maintain deep business relationships with the Indian security sector. The 2021 Pegasus deployment demonstrated Israeli technical penetration into Indian domestic security architectures.

III. COOPERATION ARCHITECTURE

The political visit provides diplomatic cover for a highly integrated security and intelligence infrastructure.

A. Weapons Systems — Procurement and Capability Gaps

India utilizes Israel to plug specific capability gaps it cannot or will not fill with acquisitions from Russia (due to Chinese reservations) or the United States (due to end-user conditions). It is highly likely that Israel offers more flexible technology transfer terms than any other Western supplier.

SYSTEM	FUNCTION	STRATEGIC SIGNIFICANCE
Spike ATGM	Anti-tank, multi-platform	Targets Pakistani armor capabilities along the Line of Control.
Heron TP & Harop	Reconnaissance / Loitering Munition	Provides precision cross-border strike capability without conventional escalation.
Phalcon AWACS	Airborne Early Warning & Control	Forms the backbone of India's early warning system (Russia refused to sell under Chinese pressure).
Barak-8	Naval Air Defense	Joint development between India and Israel—indicating deep industrial integration.
SPYDER	Short-to-medium range air defense	Deployed along the borders with Pakistan and China.
Tavor TAR-21	Special forces assault rifles	Adopted by Indian central security forces and counter-terrorism units.

B. Intelligence Cooperation — The RAW-Mossad Axis

This intelligence partnership constitutes the most operationally significant vector of the bilateral relationship:

- **Counter-terrorism:** Post-2008 (Mumbai attacks), Mossad likely provided intelligence on Pakistani logistical networks in the Gulf and Southeast Asia.
- **Joint Operations:** Recurrent reporting indicates operational coordination against ISI-linked cells in third countries.
- **Signals Intelligence (SIGINT):** Unit 8200 commercial entities possibly provided technical support for Indian interception capabilities along the borders. The Pegasus deploy-

ment indicates this relationship extends to domestic surveillance tools.

- **Assessments Exchange:** A mechanism likely exists for exchanging intelligence on Iran and its regional networks, particularly post-October 2023.

C. Cyber and Technological Integration

- **ITIF Fund:** A \$40 million joint fund financing R&D in AI and cybersecurity.
- **Cybersecurity MoU (2023):** A formal framework for protecting critical infrastructure and exchanging cyber threat intelligence.
- **Unit 8200 Commercial Footprint:** The scale of Israeli cyber firms operating within India's security sector highly likely provides Israel with operational knowledge of India's technical architecture surpassing any traditional supplier relationship.

D. Post-October 7 Acceleration

The Hamas attack triggered a qualitative shift:

- **Immediate Response:** India's unreserved condemnation abandoned decades of diplomatic "balance," indicating probable direct intelligence briefings from Mossad to RAW.
- **Combat Doctrine Transfer:** Israel possibly began transferring operational lessons from Gaza—loitering munition tactics, tunnel warfare, urban intelligence—to Indian forces preparing for Kashmir scenarios.
- **Tracking Iranian Networks:** Expanded cooperation likely includes tracking Iranian networks in South Asia and the Indian Ocean.

IV. STRATEGIC SIGNIFICANCE

A. Multi-Directional Signaling

Modi's visit during the US-Iran nuclear crisis transmits distinct strategic signals:

- **To Washington:** India aligns with the US-Israeli security architecture, reinforcing its value in the QUAD partnership and pending US defense deals.
- **To Beijing:** India possesses technical allies capable of offsetting Chinese advantages in SIGINT, air defense, and electronic warfare.
- **To Tehran:** Indian alignment prioritizes Israeli security technology over the Indo-Iranian relationship (Chabahar port, energy imports). India likely assesses Iranian leverage as degraded.

- **To Islamabad:** A direct escalation. Pakistan evaluates the India-Israel security integration as an immediate intelligence and military threat.
- **To the Domestic Audience:** Modi projects decisive global leadership; the BJP electoral base lacks sensitivity toward the Palestinian cause.

B. The Symbolic Dimension of Yad Vashem

The Yad Vashem tour connects India to Israel's foundational narrative, contrasting sharply with India's 1974 recognition of the PLO and 1988 recognition of the State of Palestine. This signals an adoption of the Israeli security paradigm over traditional non-aligned solidarity.

C. The Gulf Balancing Act

India maintains over 8 million expatriate workers in the Gulf, relying heavily on remittances and energy imports.

- The Abraham Accords (UAE and Bahrain normalization with Israel) reduced the diplomatic cost of India's alignment with Tel Aviv.
- Saudi Arabia prioritizes economic competition for Indian investment over diplomatic censure.

ANALYTICAL ASSESSMENT LIKELY

India calculates that its market size and massive labor force footprint provide it with de facto diplomatic immunity in the Gulf, shielding it from any severe economic retaliation for deepening its security alliance with Israel.

D. Comparative Sourcing Advantage

The structural logic of the alignment relies on Israel providing capabilities without the political constraints imposed by alternative suppliers.

CAPABILITY	ISRAEL	ALTERNATIVE	STRATEGIC ADVANTAGE
Loitering Munitions	Harop, custom-designed	Turkey (TB2), Iran	Enables technology transfer and joint development.
SIGINT / Intercept	Unit 8200 / NSO	United States (NSA)	Bypasses strict US end-user conditions.
Integrated Air Defense	Barak-8 (Joint)	Russia (S-400)	Evades Chinese pressure on Russian supply lines.
Counter-terrorism / HUMINT	Mossad	CIA	Enables rapid sharing without Congressional oversight bureaucracy.
Offensive Cyber	Unit 8200 companies	United States	Circumvents strict US export controls.

V. LINKS TO PRIOR PATTERNS

A. The Trajectory of Strategic Shift

The alignment represents the culmination of a multi-decade trajectory: establishing diplomatic relations (1992), breaking protocol by skipping Ramallah (2017), unconditionally condemning the October 7 attack (2023), and culminating in the Yad Vashem alignment (2026).

B. UN Voting Patterns

India's UN General Assembly voting pattern tracks this trajectory: transitioning from systematically supporting pro-Palestinian resolutions, to abstaining, to actively voting against sub-committee resolutions concerning settlements.

ANALYTICAL ASSESSMENT **LIKELY**

This voting alignment will continue to shift incrementally in Israel's favor across international forums as the defense-industrial entanglement deepens.

VI. ASSESSMENT**A. Structural Repositioning****ANALYTICAL ASSESSMENT** **HIGHLY LIKELY**

This alignment represents a structural repositioning, not a situational tactic. The integration features deep defense-industrial entanglement (Barak-8 joint development) and systemic technological reliance (Pegasus, SIGINT). The geopolitical drivers—competition with China and the threat from Pakistan—are permanent. Israel provides specific capabilities without the political strings attached by Washington or the vulnerabilities associated with Moscow.

B. Implications for Regional Actors

- **Iran:** **LIKELY** The bilateral relationship will gradually erode. While the Chabahar port may survive as a limited economic channel, strategic depth will diminish. Tehran will interpret Modi's visit during a high-stakes nuclear negotiation as an unambiguous hostile alignment.
- **Pakistan:** **HIGHLY LIKELY** Islamabad will intensify investment in counter-capabilities to offset the RAW-Mossad partnership. Pakistan will possibly accelerate intelligence and technical cooperation with China and Turkey in response.
- **Gulf States:** **LIKELY** The UAE tacitly welcomes the integration, while Saudi Arabia watches without negative response, prioritizing the economic relationship.
- **China:** **LIKELY** Beijing assesses the technical cooperation as a threat—especially in SIGINT, air defense, and drones—enhancing Indian capabilities along the Line of Actual Control (LAC).

C. Overall Trajectory

ANALYTICAL ASSESSMENT HIGHLY LIKELY

Modi's visit is a strategic declaration. The timing—at the peak of a nuclear crisis—amplifies its weight. The operational infrastructure reveals that this integration fills specific Indian capability gaps unattainable elsewhere. This integration will continue to deepen regardless of the outcome of the current Iran crisis, driven by permanent, structural security imperatives.



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ABOUT CORE GROUP

Core Group is a Beirut-based strategic foresight house. We produce decision-ready analysis and advisory for governments, diplomatic institutions, and strategic investors navigating Middle Eastern complexity. Our work integrates structured analytical products, applied strategic advisory, and analysis-informed mediation; delivered on daily and weekly cycles calibrated to the speed at which the situation changes.

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