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Changing Trends in India–Israel Defence Equation: The Iron Swords War

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War can catalyse shifts in global power dynamics, prompting nations to re-evaluate their alliances based on emerging geopolitical realities. This realignment may expose latent tensions or historical grievances, leading to either strengthened cooperation among some states or the unravelling of previously stable partnerships. Since 7 October 2023, Israel has faced considerable delays in arms shipments and significant threats of an arms embargo from Western countries, a development that underscores the shifting dynamics of international support. This situation has become particularly pronounced as these threats have also emerged from Washington, Israel's most critical ally, which has employed military aid as a tool of policy leverage.² Such developments reinvigorate the long-standing debate among Israeli decision makers and the public regarding the consequences of Israel's reliance on American military assistance, particularly concerning its national interests and autonomy.³

The potential conditionality of this aid raises critical questions about Israel's ability to maintain an independent foreign policy and respond effectively to emerging security challenges, thereby highlighting the complex interplay between military dependence and sovereign decision making in a rapidly evolving geopolitical landscape.⁴ India's expanding role in the international arms market, coupled with its strong defence industrial base, aligns with Israel's interest in strengthening relationships that enhance national security while preserving strategic autonomy. The deepening defence ties between Jerusalem and New Delhi reflect

not only an economic and military partnership but also a geopolitical strategy, offering Israel a crucial means to reduce its traditional reliance on Western arms and navigate the increasingly complex and multipolar global order, particularly in a time of heightened political and security uncertainty.

Arms Embargo and Limitations of Dependence on the United States

Initially, following the attack on 7 October, Israel garnered widespread support from countries across the globe. However, this initial backing swiftly transformed into vehement criticism. Subsequently, several nations decided to sever diplomatic ties with Israel, recalling their ambassadors and issuing hostile statements. Furthermore, these countries voted in favour of resolutions that were explicitly against Israel.⁵ Starting in February 2024, there was a noticeable shift in international opinion regarding the implementation of an arms embargo against Israel. In France, Members of Parliament demanded detailed information from the defence minister regarding items sent to Israel. Israeli companies were also barred from participating in the annual Eurosatory arms and defence industry exhibition in May in Paris. In Ireland, a statement was approved to prohibit American planes carrying ammunition to Israel to fly through the country's airspace. Italy began covert boycotting, while England started both delaying arms shipments and participating in 'quiet boycotts'. Lately, this stance has gained support from other countries, including Canada, Belgium and Spain.⁶ Additionally, major manufacturers are involved in a 'quiet boycott', which delays the delivery of raw materials for a significant Israel Defense Forces (IDF) defence project. These disruptions also extend to other critical IDF combat systems, such as the Merkava tank and Namer armoured personal carriers, which rely on hundreds of foreign suppliers.⁷

Twelve months into the war, there have been increasing international calls for an arms embargo on Israel. This is due to the nation's expansion of military operations against Iran-backed militant groups in the region. In September 2024, under Prime Minister Keir Starmer, the recently elected Labour-led government in the United Kingdom (UK) revoked 30 export licences and implemented changes that will complicate future defence exports to Israel.⁸ Berlin, the prominent European supplier of arms to the Jewish state, halted arms sales to Israel since the beginning of 2024. French President Emmanuel Macron too called for an arms embargo on Israel, stating that it was the only way to end the fighting in Gaza and Lebanon.⁹

However, the most alarming acts came from Washington—responsible for over two-thirds (69 per cent) of Israel's foreign arms purchases—particularly in the context of the Rafah operation.¹⁰ In May 2024, the embargo, which the administration preferred to call 'pause' or 'review', included 2,000 pound bombs, 500 pound bombs and holding up Joint Direct Attack Munitions, which convert unguided bombs into precision 'smart' bombs. Meanwhile, *Politico* reported that small diameter bombs were being withheld. Further, the Biden administration was said to be sitting on a deal that included tank shells and mortar rounds. All this was in contrast to the tremendous support the US showed in the first months of the war. With the outbreak of the Iron Swords war, an American air train began arriving in Israel. According to reports, 100 transport planes landed in Israel in the first three weeks of the fighting and five cargo ships docked in the ports. Along with medical equipment, vehicles and combat equipment, the supply included about 3,000 tonnes of weapons and armaments for the air force and the army. This was essential supply, without which the war effort could not have been sustained. In April 2024, by 79–18 in the Senate and 366–58 in the House, the US Congress had approved military aid to Israel. The overwhelming votes, including a majority of both parties, marked a significant defeat for the anti-Israel left.¹¹

However, alongside an impressive show of support, the air train brought with it something else: it revealed the complete dependence of IDF operations on American interests.¹² Since the Six-Day War, Israel has relied on the US to shield it from international pressures, allowing it room to manoeuvre and defend itself, particularly in forums like the United Nations Security Council. This reliance is typical in the relationship between a small nation and a superpower. However, a more concerning trend has emerged in recent years, that is, a dependence on the continuous supply of ammunition and weapons. This situation undermines Israel's independence, a fundamental aspect of its sovereignty. Any military action beyond a brief operation now necessitates American support for replenishing armaments and sustaining assistance. Although this dependence is not new, the unique nature of the current conflict suggests its consequences could be more severe than ever before.¹³

American military assistance to Israel has been a cornerstone of the US–Israel relationship since the 1970s, emerging as a response to the geopolitical realities of the Cold War. This assistance, initially provided to secure Israel's survival amid hostile regional neighbours, has evolved into a comprehensive aid package that includes not only financial support but also advanced military technologies and

intelligence sharing. The Foreign Military Financing programme has been a critical mechanism through which the US provides billions of dollars annually to Israel to procure American-made defence equipment. This aid has been crucial in bolstering Israel's military capabilities, allowing it to maintain a qualitative military edge over its adversaries in the region. The support also reflects broader US strategic interests in maintaining stability in the Middle East, safeguarding its ally's security and curbing the influence of rival powers, such as Iran.¹⁴

The US military assistance remains vital to Israel's defence apparatus, but comes with challenges and conditions. The US has increasingly used military aid as a tool of diplomatic leverage, pressing Israel to align its policies with American interests, particularly regarding the Israeli–Palestinian conflict. For instance, the 2016 memorandum of understanding between the two countries, which commits the US to providing \$38 billion in military aid over 10 years, also includes stipulations that limit how much of the aid Israel can spend domestically.¹⁵ This has sparked debates in Israel about the nation's over-reliance on American military assistance and its potential impact on Israeli sovereignty. With shifting geopolitical dynamics and concerns over conditionality, Israeli leaders are exploring ways to diversify military partnerships. Nonetheless, US military assistance remains pivotal in Israel's defence strategy and broader foreign policy. In April 2024, the US approved \$26.4 billion in emergency security assistance for Israel, including \$14 billion for military aid.¹⁶

Despite the considerable support provided by the US military aid, there has been a growing chorus within Israel's defence circles advocating for a reduction in dependency. Their main concerns revolve around the potential loss of independence in the production of arms and the diminishing investment in Israel's own defence industry. Furthermore, critics argue that the current defensive strategy, which heavily relies on costly technological solutions and concessions of territory, should be replaced with an offensive doctrine that prioritises initiative, decisive victories and territorial control. They also contend that the reliance on military aid undermines Israel's long-term strategic goals and presents the country as overly dependent on the US, potentially weakening its position in the face of adversaries. Additionally, the increasing opposition to military aid within both American political parties, combined with growing divisions in Congress, has turned the issue of aid to Israel into a contentious political matter.¹⁷

The historical relationship between Israel and the US has been characterised by fluctuations, particularly in the context of military and economic support. During the 1950s, the US aid to Israel was predominantly civilian in nature,

aimed at assisting the nascent Israeli state to overcome financial adversities, often in the form of modest grants and loans. However, a significant shift occurred following the Six-Day War in June 1967, when the US acknowledged Israel's strategic significance within the broader Middle Eastern landscape. Subsequently, the US emerged as the primary source of arms for Israel, intertwining economic and security assistance. Post the 1973 Yom Kippur War, the US military aid to Israel underwent substantial escalation, with security assistance assuming a pivotal role in the bilateral relationship. Thus, despite the crucial role of military assistance, it has never been solely charitable; instead, it is deeply entrenched in a shared, enduring strategic vision between the two nations. Over time, the relationship has witnessed both peaks and troughs, including instances where the US imposed arms embargoes on Israel during its conflicts. This historical trajectory underscores their partnership's intricate and strategic nature, wherein military aid plays a critical yet contested role.¹⁸

Amid the escalating conflict in the Middle East, particularly with Israel's military actions in Lebanon and the worsening humanitarian crisis in Gaza, the trust between the two nations has significantly eroded. In an unprecedented move since the start of the war, in October 2024, the US explicitly threatened Israel with an arms embargo. In a formal communication to Israeli Defense Minister Yoav Galant and Strategic Affairs Minister Ron Dermer, the then US Secretary of State Antony Blinken and the then Defense Secretary Lloyd Austin called for immediate steps to improve humanitarian conditions in Gaza, setting a 30 day deadline. Indeed, if Israel does not change its military strategies and policies, it could face a critical shortage of arms, worsened by the US's ongoing delays in delivering crucial munitions, including 900 kilogram bombs.¹⁹

The economics of armaments has become one of the most significant issues in the context of the Iron Swords war. This war is considered as one of Israel's most notable conflicts due to several reasons, including the duration of the fighting, the extent of damage to the home front and the number of combat fronts involved—the highest since the its War of Independence. As the conflict in Lebanon escalates, marked by an increasing volume of rocket and missile attacks on Israel, there is significant pressure on Israel's defence industries to increase the production of interceptor missiles. By mid-October 2024, Hezbollah appeared to have recovered from the blows delivered by Israel throughout the previous month, as evidenced by the growing intensity and frequency of its rocket fire towards numerous locations in northern Israel, including Haifa and the surrounding areas. Despite the Israeli Air Force targeting parts of Hezbollah's

arsenal, the militant group still possesses a considerable stockpile of rockets and missiles with varying ranges, intensifying the demand for interceptors.²⁰

Israel's defence industries, notably the Israel Aerospace Industries (IAI), have been operating in emergency mode since the commencement of the war. These industries have been running specific production lines round the clock to ensure a continuous supply of military equipment, including interceptors, to the IDF. Concurrently, these industries are obligated to fulfil the demands of foreign clients, many of whom are involved in an arms race exacerbated by the ongoing conflict between Russia and Ukraine. Production for foreign clients is contractually bound by agreements signed before the outbreak of the conflict in Israel. These agreements stipulate preset delivery deadlines, and any delays could lead to significant penalties for Israeli companies. For instance, in addition to producing Arrow missiles for the IDF, the IAI manufactures Arrow 3 missiles for Germany as part of the largest defence deal in Israel's history, valued at approximately 14 billion shekels. Israel has not publicly disclosed its stockpile of interceptor missiles, whether involving Arrow missiles or those used in the Iron Dome system, which primarily intercepts short-range rockets launched from Gaza and Lebanon. However, unlike the production of Iron Dome interceptors, which are also finite, the manufacturing process for Arrow missiles is considerably lengthier.²¹

The Israeli industries are facing unprecedented production challenges to provide the IDF with more operational flexibility across multiple fronts. These challenges are compounded by the growing negative sentiment towards Israel globally, resulting in increasing difficulties in securing raw materials from international suppliers. These materials include various metals and unique electronic components that Israeli industries previously imported from foreign companies. Many of these suppliers, particularly in Europe, have adopted a selective approach, sometimes halting supplies entirely, especially for military-related materials. Israel's defence industries have had to devise solutions to counter these embargoes, many of which are unofficial or partially concealed. The IAI recently inaugurated a new facility in Ofakim to produce components previously imported from abroad, so as to overcome supply chain disruptions. However, such initiatives come at a significant cost, particularly with regards to time, an increasingly scarce and valuable resource given the high demand for defence materials in the current conflict.²²

This issue has become more prominent in the current war, but there were early signs before the conflict started. High-ranking officials from Israel's legal,

political and security sectors had already expressed concerns beforehand. The 2014 report from the state auditor highlighted a significant concern regarding Israel's armament independence. Due to budgetary preferences, production lines were diminished and became obsolete, which adversely impacted the production capacity of light ammunition, tank and artillery munitions, as well as aerial munitions. Consequently, this situation rendered the Israeli defense industry unable to meet the requirements of the Israel Defense Forces (IDF), increasing reliance on American resources.²³ However, the lessons were not learned. In an article published in *Systems*, Major General Tamir Yedai, commander of the ground arm, highlighted how the situation worsened during major operations in Gaza, such as 'Operation Cast Lead' (2008–9) and 'Operation Protective Edge' (2014), where the IDF needed urgent equipment items.²⁴ This issue of emergency aid during a crisis has become politically controversial in the US, pushing Israel, which seeks to project an image of power, into a corner. Several years ago, this issue started to be examined in the chambers of Israel's political and security establishment. An initial document was written and submitted to Prime Minister Netanyahu, but the deep internal rift surrounding legal reform thwarted the clarification, which was only in its infancy. Additionally, in 2019, senior defence officials called for decreased dependency on the US.²⁵

It is obvious that one year after the surprise attack on Israel, the country is facing increasing international pressure to stop its military operations. This pressure includes direct and indirect arms embargoes, and the relationship between Washington and Jerusalem has been strained. In response to these challenges, the Israeli public has called for a review of the nation's security doctrine.²⁶ In light of these developments, Israel and its defence establishment must thoroughly assess their strategic posture. A key part of this reassessment is the need to reconsider the role of US military aid, considering both its benefits and the potential vulnerabilities it creates. A major priority will be to rebuild Israel's military supply chains to ensure greater self-reliance and resilience. This will involve developing new stockpiles within Israel's borders, expanding domestic arms production capabilities and diversifying import sources to reduce dependence on any single foreign partner. These strategic adjustments are crucial for addressing immediate security threats and ensuring the nation's ability to recover and rebuild after the current conflict.

India's Defence Sector: A Strategic Lifeline in Crisis

Amid widespread global condemnation of Israel, India, a country that has long considered the Palestinian issue a central element of its foreign policy, has taken a more measured and balanced approach. For the first time in Israel's history of wars, India has condemned Hamas's terrorist attack.²⁷ Additionally, India's role has become increasingly significant for Israel's economy, especially in providing labour to make up for the loss of Palestinian workers.²⁸ However, the most critical development is India's shift to becoming a munitions supplier to Israel, reversing the traditional one-sided seller–client dynamic between the two nations.

New Delhi, a major arms importer from Israel, has become a crucial source of ammunition for the Jewish state during the recent crisis in the region. Adani–Elbit Advanced Systems India Ltd, a joint venture between Adani Defence and Aerospace and Israel's Elbit Systems, has played a key role in exporting munitions to Israel. These exports include Indian aerostructures, sub-systems and over 20 Hermes 900 unmanned aerial vehicles (UAVs)/drones. Additionally, the government-owned Munitions India Limited (MIL) has exported ordnance to Israel as recently as January 2024.²⁹ These developments marked a new direction in the relationship equation between the countries.

India has been a significant foreign customer for Israeli arms manufacturers. Although military deals only proliferated once diplomatic ties were established, the countries did have clandestine relations before 1992. For instance, Israel provided India with weapons in 1962 during the war against China; and then, in 1965, during the war against Pakistan.³⁰ By the early 1970s, the Indian military establishment was impressed and enamoured with Israeli technology. Following several interactions between military leaders in the early 1990s, India agreed to assign a defence attaché to Tel Aviv in 1995. In 1999, Israel provided India with urgent assistance in its conflict with Pakistan, establishing the country as a reliable military partner. Between 1997 and 2000, 15 per cent of all Israeli arms exports travelled to India. By the mid-2000s, this had increased to 27 per cent, with India broadening its range of purchases, such as surveillance equipment, drones and surface-to-air missiles. Between 2000 and 2010, India spent around \$10 billion on Israeli arms.³¹ According to Stockholm International Peace Research Institute (SIPRI), weapons deliveries to India from Israel increased by 175 per cent between 2015 and 2019.³² In its recent 'surgical strikes' on Pakistan in 2019, India used Israeli-made 'Spice 2000' bombs.³³ In 2021, during the stand-off with China, India leased and finally bought four Heron TP medium-altitude long-endurance UAVs from IAI.³⁴

The support provided by India to Israel's defence in the ongoing war illustrates the strategic role that the country could play in Israel's new security strategies. This support is in line with India's Make in India initiative for defence, which has also contributed to India's defence export objectives. In May 2024, reports indicated that India aims to increase its domestic ammunition production due to global shortages and rising demand.³⁵ Shortages of ammunition have been caused by ongoing international conflicts. Simultaneously, with Saudi Arabia and other Middle Eastern countries building up their ammunition stockpiles, there has been an increase in demand, leading to global scarcity of ammunition. India has started taking advantage of the opportunities arising from both these factors. The country's achievement results from a decade-long reform agenda to improve the ease of doing business and promote domestic production. These reforms and efforts to promote indigenous production have created an environment conducive to growth in defence output. As a result, there has been a significant increase in domestic production and defence exports, which reached Rs 21,083 crore in fiscal year (FY) 2023–24, marking a 32.5 per cent increase from the previous FY.³⁶

In May 2024, the Indian Army significantly reduced its reliance on imported ammunition, in line with the Make in India policy, mainly due to the contributions of private companies. Previously, the army used to allocate 35–40 per cent of its annual ammunition budget of approximately Rs 20,000 crore to imports. However, this figure has now dropped to under 10 per cent, with further reductions planned. This movement towards indigenisation decreases dependency on imports and expands India's export capabilities. Both public and private indigenous firms are now catering to global ammunition demands. The MIL, a public sector company, and private firms, such as Solar Industries Limited, Adani Defence, Hughes Precision and SMPP Limited, have played crucial roles in this transformation. Notably, MIL has secured substantial export orders for artillery shells, fostering the development of supporting industries.³⁷ Additionally, a joint venture between Adani Defence and Aerospace and Thales (Belgium) has been established to manufacture and assemble North Atlantic Treaty Organization (NATO)-standard 70 millimetre (mm) (2.75 inch)-calibre ammunition currently used in Ukraine. The second phase of expansion at a 500 acre facility in Kanpur, located in the northern state of Uttar Pradesh, will include the production of medium-calibre ammunition for India's attack helicopters. This facility is now the largest integrated ammunition manufacturing site in South Asia.³⁸

The changing geopolitical landscape presents opportunities and challenges

for India's defence export ambitions. Russia's invasion of Ukraine and the resulting sanctions have also impacted India's defence exports. In January 2022, India finalised a \$375 million deal with the Philippines to sell three BrahMos supersonic cruise missile system batteries developed jointly with Russia. This export marked a significant milestone in India's efforts to establish itself as an arms exporter. However, there were delays in fulfilling this commitment, and the first batch was delivered in April 2024. This also had implications for the sales to Indonesia and Vietnam.³⁹

Recently, India has transitioned from being a major arms importer to one of the top 25 arms-exporting nations, as per SIPRI.⁴⁰ India exports arms, ammunition and related items to over 85 countries, with 100 Indian firms involved in international sales. The notable exports include diverse items, such as the Dornier 228, 155 mm advanced towed artillery guns, BrahMos missiles, Akash missile system, radars, simulators, mine protected vehicles, armoured vehicles, Pinaka rockets and launchers, ammunitions, thermal imagers and body armours, along with systems, line replaceable units and parts and components of avionics and small arms. It is worth noting that most exports are driven by the private sector, while the state-owned defence production units have made limited contributions. However, most private sector exports consist of parts, components, assemblies and sub-assemblies, with only a few Indian companies exporting significant systems. Among the private sector exports, Bharat Forge's export of 155 mm artillery guns, valued at US\$ 155 million, stands out.⁴¹

As mentioned earlier, the current geopolitical situation has positively impacted India's export capabilities amidst growing tension in the Middle East. The MIL, an Indian defence producer, has won a contract to supply artillery ammunition to the Kingdom of Saudi Arabia. In the World Defense Show 2024, Saudi Arabia placed a large order for 155 mm artillery ammunition. The signed contract is worth \$225 million, making it MIL's most significant export order.⁴²

As a non-traditional arms manufacturer, India faces numerous challenges that affect its ability to produce high-quality defence products. Partnerships with Israel, a country with significant expertise in arms manufacturing, could be the key to accelerating India's progress in closing this gap. Such collaborations also align with and strengthen the Modi government's Atmanirbhar Bharat (self-reliant India) initiative, advancing India's position as a significant arms exporter while addressing the technological needs of the Indian Armed Forces. Joint ventures and investments in defence manufacturing may serve as a critical solution to these challenges. Israel should embrace India's role as a major defence partner.

This alliance not only fortifies Israel's defence strengths but also amplifies India's technological advancements in missile and drone production. The ongoing evolution in high-precision guided artillery ammunition, driven by private and public sector initiatives, is poised to further elevate New Delhi and Jerusalem capabilities.

Today, major powers are increasingly conducting their conflicts through global supply chains.⁴³ India has the opportunity to position itself at the forefront of this power shift by becoming a key player in global arms shipments. The ongoing Iron Swords war has also created new prospects for India to strengthen its relationship with Jerusalem and gain more influence in international negotiations. The US should support these developments as part of its broader geopolitical strategy to counter Russia's influence in the global market. With Russia's capacity to meet market demands compromised by its invasion of Ukraine, endorsing India's increased role would be in line with the US' geopolitical objectives. By taking the necessary actions, both Washington and New Delhi can enable India to fill the void left by Russia in the global market, thus preventing China from doing so.

Israel's alliance with the US remains indispensable. However, following the war, a pivotal question arises: how can Israel reduce its military reliance on the US? One possible avenue lies in diversifying its strategic partnerships. While Israel cannot feasibly shoulder the costs of establishing a fully independent ammunition production system capable of meeting all the IDF's demands in a future conflict, it must continue to explore options for reducing its dependence on the US military aid. This can be achieved by increasing the production of weapons and ammunition; diversifying procurement through collaboration with other nations, such as Italy, India, Singapore and South Korea; and creating joint funds for shared weapons development and emergency reserves. By perusing these steps, Israel can ensure its autonomy in defence, even in times of conflict when American support may be limited. This will allow Israel flexibility in its offensive military response in a multi-arena campaign.

The defence collaboration between India and Israel in the ongoing war demonstrates a strong strategic partnership that significantly enhances both nations' military capabilities. This alliance not only strengthens Israel's defence capabilities but also boosts India's technological advancements in missile and drone production. It is important to note that while both sides focus on achieving self-reliance, it is crucial not to isolate the nation from global supply chains. Instead, efforts should

be directed towards leveraging domestic strengths and resources. India should achieve self-reliance by leading in specific sectors and establishing solid global partnerships in areas it lacks expertise. This approach involves excelling in domains where the West has relative disadvantages, while facilitating technology transfers in critical and emerging fields.

NOTES

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