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Quad FM Meeting Delhi – IPMSC, Critical Minerals Framework, and India-US Bilateral CMF

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WHY IN NEWS:

The **11th Quad Foreign Ministers' Meeting** at **Hyderabad House, New Delhi on May 26, 2026** — hosted by **EAM S. Jaishankar** with **US Secretary of State Marco Rubio (first official India visit), Australia's Penny Wong, and Japan's Toshimitsu Motegi** — adopted two flagship outcomes: the **Critical Minerals Initiative Framework** mobilising up to **USD 20 billion** (public + private capital) for resilient rare-earth and lithium supply chains, and the **Indo-Pacific Maritime Surveillance Collaboration (IPMSC)** — a first-of-kind grouping of MDA platforms across the four navies. Alongside, **India and the US signed a bilateral Critical Minerals Framework** covering the full value chain (mining, processing, recycling, investment). The Hindu's May 30 editorial titled "**Different directions**" notes that the meeting also revealed widening divergences among the four partners on China, trade, and Indo-Pacific security architecture.

THE QUAD — ARCHITECTURE

PARAMETER	DETAIL
Members	United States, India, Japan, Australia
Origin	Conceived by Japanese PM Shinzo Abe following the 2004 Indian Ocean Tsunami (Tsunami Core Group: US-India-Japan-Australia); first formal Quad dialogue May 2007 (Manila, ASEAN sidelines)
Hiatus	Australia's withdrawal under PM Kevin Rudd (2008); Quad dormant 2008–2017
Revival	November 2017 at the ASEAN Summit, Manila — working-level meeting
FM-level	Annual FM-level meetings from 2019
Leaders' summit	First virtual March 2021 (Biden); first in-person September 2021 (Washington) ; subsequent: Tokyo 2022, Hiroshima sidelines 2023, Wilmington 2024
Theme	A free, open, inclusive, and rules-based Indo-Pacific (FOIIP)
Nature	Non-treaty, minilateral — not a military alliance; based on shared interests

THE 11TH FM MEETING — OUTCOMES

1. Critical Minerals Initiative Framework — USD 20 billion target

The framework targets **resilient supply chains** for critical minerals — **rare earths, lithium, cobalt, nickel, graphite** — currently dominated by China (60-80% of global processing). Key components:

- **Public + private capital mobilisation target: up to USD 20 billion.**
- Joint exploration, processing, and recycling investments across Quad geographies and partner countries (notably Australia, which holds significant lithium and rare-earth reserves).
- Coordinated **export controls** and **due-diligence frameworks** to limit “circumvention” of supply-chain de-risking.
- Linkage to **India's National Critical Mineral Mission (NCMM)** — ₹**34,300 crore** corpus (Union Budget 2024-25; approved 2025; covers 2025-2031).

2. Indo-Pacific Maritime Surveillance Collaboration (IPMSC)

A **first-of-kind** initiative integrating **Maritime Domain Awareness (MDA) platforms** across the four Quad navies:

- Builds on the **Indo-Pacific Partnership for MDA (IPMDA)** announced at the **Quad Tokyo Summit (May 2022)**.
- Complements India's **Information Fusion Centre – Indian Ocean Region (IFC-IOR)** at **Gurugram (Haryana)**, established **2018** under the **Indian Navy**.
- Strategic objective: **near-real-time tracking** of vessels in the Indo-Pacific to counter illegal fishing, smuggling, and PLA Navy presence.
- Operational under the **SAGAR doctrine** (Security and Growth for All in the Region – 2015).

3. Quad Initiative on Indo-Pacific Energy Security

A new framework focused on:

- **Clean energy supply chains** (solar wafers, batteries).
- **Civil nuclear cooperation** – particularly Small Modular Reactors (SMRs).
- **Maritime energy infrastructure** including LNG terminals.

4. Fiji Port Infrastructure Cooperation

A focused Pacific Island initiative – joint Quad investment in port infrastructure at Fiji, signalling Quad's expanding **Pacific Islands engagement** (counter to expanding Chinese ports access in the region).

5. 6G Standards Collaboration

A Quad working group on **6G technology standards**, ensuring trusted-vendor alignment for next-generation telecom – building on the **Quad Critical and Emerging Technologies (CET) Working Group**.

INDIA-US BILATERAL CRITICAL MINERALS FRAMEWORK

Signed by **EAM Jaishankar** and **US Secretary of State Rubio** at **Hyderabad House on May 26, 2026**, alongside the Quad meeting. Distinct from the multilateral Quad framework – a deeper bilateral instrument covering:

COMPONENT	DETAIL
Mining	Joint exploration in third-country deposits (Africa, Latin America); offtake agreements for Indian smelters/refineries
Processing	Co-investment in midstream processing (currently China dominates 60-80% globally for cobalt, lithium, rare earths)
Recycling	Urban mining; battery recycling joint ventures
Investment	Channelled via the US Development Finance Corporation (DFC) and Indian National Critical Mineral Mission (NCMM)
Linkage	India's list of 30 critical minerals (released June 2023, Ministry of Mines); India's rare-earth reserves rank 5th globally (~6.9 million tonnes)

Why It Matters

- **China's dominance** of rare-earth processing makes ALL major economies vulnerable to a single-source disruption.
- India is **100% import-dependent** on **lithium, cobalt, nickel**.
- The US is dependent on China for **~80% of its rare-earth processing**.
- Friend-shoring of critical-mineral supply chains is the central strategic-tech response.

THE HINDU'S "DIFFERENT DIRECTIONS" EDITORIAL

The Hindu's May 30 lead editorial argues that while the Quad meeting produced concrete deliverables, it also revealed **strategic divergences**:

DIVERGENCE	DETAIL
On China	The Trump administration's transactional approach to Beijing (tariffs + trade deals) sits uneasily with Quad's strategic-de-risking frame
On trade	US-India tariff frictions (steel, aluminium, pharmaceuticals) and the IPEF Pillar I (Trade) impasse
On Indo-Pacific	Diverging approaches to South China Sea (Japan/Australia closer to ASEAN's Code of Conduct; US more bilateral)
On critical minerals	US prefers exclusivist friend-shoring; India insists on non-bloc-based supply chain access (compatible with BRICS, SCO)

INDIA'S STRATEGIC AUTONOMY TEST

India's challenge is to **maximise gains from Quad engagement without bloc-capture**:

- **Quad Critical Minerals Initiative (USD 20 bn)** — engage.
- **Parallel BRICS** chairmanship (2026 — India's turn) — preserved.
- **35th India-China WMCC border talks** in Beijing on **May 27** (one day after Quad) — signalled balancing.
- **S-400 + S-500 from Russia** under sanctions risk (CAATSA) — preserved.
- **India-Russia bilateral defence** continuity (Putin's planned India visit, 23rd Annual Summit) — preserved.

UPSC RELEVANCE

PAPER	RELEVANCE
GS2	Quad evolution, Indo-Pacific strategy, India-US bilateral, strategic autonomy, unilateral diplomacy
GS3	Critical minerals security, supply-chain resilience, maritime domain awareness, defence technology
Mains	“Critically examine the Quad's transition from a maritime-security unilateral to an economic-security platform. How does this serve India's strategic autonomy?”
Prelims	Quad origin (2007 Manila), revival (2017), Tsunami Core Group (2004), IPMDA (Tokyo 2022), IFC-IOR (Gurugram 2018), SAGAR doctrine (2015), India's Critical Minerals (30, June 2023), NCMM (₹34,300 cr, 2025-2031), DFC (US development finance)

FACTS CORNER

QUAD — KEY FACTS:

Members: USA, India, Japan, Australia

Origin: Tsunami Core Group (2004); first dialogue May 2007 Manila

Revival: November 2017 (ASEAN Manila, working level)

FM-level meetings: Annual since 2019

First Leaders' Summit: March 2021 (virtual); in-person September 2021 Washington

Theme: Free, Open, Inclusive, Rules-based Indo-Pacific (FOIIP)

Nature: Non-treaty, non-alliance minilateral

11TH FM MEETING (MAY 26, 2026, HYDERABAD HOUSE):

Outcomes: Critical Minerals Initiative Framework (\$20 bn target); Indo-Pacific Maritime Surveillance Collaboration (IPMSC); Quad Initiative on Indo-Pacific Energy Security; Fiji port cooperation; 6G standards collaboration

INDIA-US BILATERAL CRITICAL MINERALS FRAMEWORK:

Signed May 26, 2026 at Hyderabad House

Covers: mining, processing, recycling, investment

Channels: US Development Finance Corporation (DFC) + India NCMM

INDIA'S CRITICAL MINERALS ARCHITECTURE:

30 critical minerals list: Released June 2023 (Ministry of Mines)

National Critical Mineral Mission (NCMM): ₹34,300 crore corpus, 2025-2031

KABIL (Khanij Bidesh India Ltd) — overseas mineral acquisition arm; JV of NALCO + HCL + MECL

India's rare-earth reserves: 5th globally (~6.9 million tonnes)

Import dependence: 100% for lithium, cobalt, nickel

MARITIME DOMAIN AWARENESS:

IPMDA — Indo-Pacific Partnership for MDA, launched Tokyo Quad Summit May 2022

IFC-IOR — Information Fusion Centre, Indian Ocean Region, Gurugram, est. 2018

SAGAR doctrine — Security And Growth for All in the Region, articulated by PM Modi in 2015 (Mauritius)

MAHASAGAR (Mutual and Holistic Advancement for Security and Growth Across Regions) — successor concept articulated in 2025

CHINA DOMINANCE — WHY CRITICAL MINERALS MATTER:

60-80% of global processing of cobalt, lithium, rare earths

~80% of US rare-earth processing dependence on China

EU Critical Raw Materials Act, 2023 — 10% domestic extraction, 40% processing, max 65% from single third country by 2030

US Inflation Reduction Act, 2022 — links EV subsidies to supply-chain diversification away from China

Source: Quad FM Meeting Delhi — IPMSC, Critical Minerals Framework, and India-US Bilateral CMF —
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