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EDITORIAL ANALYSIS

Different Directions: The 11th Quad FM Meeting and the Strategic Drift

THE HINDU

30 May 2026 · IR · SECURITY & DEFENCE · GS2

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 The Hindu

30 May 2026

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The Hindu

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INTERVIEW ANGLE

"India hosted the 11th Quad FM Meeting at Hyderabad House on May 26, 2026. The grouping has produced flagship initiatives — the USD 20 bn Critical Minerals Framework and IPMSC — but the editorial flags growing divergences on China, trade, and Indo-Pacific architecture. As an MEA officer, how would you preserve Quad's utility for India without bloc-capture?"

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The 11th Quad Foreign Ministers' Meeting in New Delhi (May 26, 2026) produced two flagship outcomes — the **CRITICAL MINERALS INITIATIVE FRAMEWORK**

(USD 20 bn target) and the **Indo-Pacific Maritime Surveillance Collaboration (IPMSC)**. But the editorial argues that beneath the deliverables, the four partners are pulling in different strategic directions on China, trade, and the Indo-Pacific order — weakening Quad's coherence even as India works to keep it functional.

THE ARGUMENT IN ONE LINE

Quad's transition from a maritime-security minilateral to an economic-security platform has produced concrete deliverables, but the **strategic alignment that birthed it is fraying** — and India's challenge is to extract maximum value from a coalition whose anchor (US strategic clarity on China) is in flux.

THE FOUR DIVERGENCES THE EDITORIAL FLAGS

DIVERGENCE	READING
On China	Trump-era transactional approach — tariffs alternating with trade deals — sits uneasily with Quad’s earlier strategic-de-risking frame; Japan and Australia still see China as the strategic challenge, US is in flux
On trade	US-India tariff frictions (steel, aluminium, pharma) continue; IPEF Pillar I (Trade) impasse persists; India retains parallel BRICS commitment
On Indo-Pacific architecture	US is more bilateral (AUKUS, US-Philippines); Japan + Australia closer to ASEAN’s Code of Conduct; India insists on inclusive Indo-Pacific (compatible with SAGAR, BIMSTEC, BRICS)
On critical minerals	US prefers exclusivist friend-shoring (with FTA/CHIPS partners); India insists on non-bloc supply chain access (Africa via KABIL, Latin America)

QUAD — WHAT WAS ADOPTED

- **Critical Minerals Initiative Framework** — USD 20 bn target across public + private capital for rare earths, lithium, cobalt, nickel, graphite supply chains. Linked to India’s **NCMM ₹34,300 crore (2025-2031)**.
- **Indo-Pacific Maritime Surveillance Collaboration (IPMSC)** — first-of-kind integration of MDA platforms across the four navies. Builds on **IPMDA (Tokyo Summit, May 2022)**. Complements India’s **IFC-IOR Gurugram** (est. 2018).
- **Quad Initiative on Indo-Pacific Energy Security** — clean energy supply chains; civil nuclear (SMRs); maritime energy infrastructure.
- **Fiji port infrastructure cooperation** — Pacific Islands push.
- **6G standards collaboration** — Critical and Emerging Technologies Working Group output.

BILATERAL BONUS — INDIA-US CMF

Alongside the Quad meeting, Jaishankar and Rubio signed the **India-US Critical Minerals Framework** at Hyderabad House — covering mining, processing, recycling, investment; channelled via the **US Development Finance Corporation (DFC)** and India’s **NCMM**.

INDIA’S STRATEGIC AUTONOMY TEST

Why “drift” matters less for India than for some critics suggest:

INDIA'S PARALLEL ENGAGEMENTS (MAY 2026)	ROLE
BRICS chairmanship 2026	India hosting; preserves Global South channel
35th India-China WMCC border talks (Beijing, May 27)	One day after Quad — explicit balancing signal
S-400 + ongoing Russia defence ties	Preserved despite CAATSA risk
India-EU FTA negotiations	Active
Myanmar engagement (Min Aung Hlaing visit, May 30 - June 3)	Independent of Quad position

The “drift” is real but **does not require India to choose** — strategic autonomy is built precisely for moments like this.

WHAT INDIA SHOULD PUSH FOR

- ① **Critical Minerals — operationalisation** — convert the \$20 bn target into joint projects via KABIL (Khanij Bidesh India Ltd) + Quad partner equity.
- ② **IPMSC — domain expansion** — extend to undersea cables, fisheries, dark-fleet tracking (linked to dual-use IUU fishing concerns).
- ③ **6G standards** — push for ITU-led inclusive standards rather than bloc-based.
- ④ **Indo-Pacific economic engagement** — engage IPEF without bloc-locking; preserve RCEP option (which India left in 2019).
- ⑤ **South-South linkages** — leverage Quad’s Pacific Island engagement (Fiji ports) alongside India’s own Pacific engagement via FIPIC.

UPSC HOOKS

PAPER	ANGLE
GS2	Quad evolution; Indo-Pacific strategy; unilateral diplomacy; strategic autonomy; India-China-US triangle
Mains	“Critically examine the Quad’s evolution from a maritime-security unilateral to an economic-security platform. How does this serve India’s strategic autonomy?”
Prelims	Quad origin (Tsunami Core Group 2004, first dialogue May 2007 Manila); revival Nov 2017; FM-level from 2019; first Leaders’ Summit virtual March 2021; IPMDA Tokyo Quad May 2022; IFC-IOR Gurugram 2018; SAGAR (2015); MAHASAGAR (2025)

CROSS-LINKS

- India-US Critical Minerals Framework (May 26, 2026)
- India's NCMM ₹34,300 cr (2025-2031)
- 35th India-China WMCC talks (Beijing, May 27, 2026)
- IPMDA + IFC-IOR Gurugram
- BRICS 2026 (India chairmanship)

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