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# CRITICAL MINERALS, ENERGY, MARITIME SECURITY, AND CRITICAL INFRASTRUCTURE: IS THE QUAD DELHI MEET A STEP TOWARDS REVIVING AND INSTITUTIONALISING QUAD?

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**Critical Minerals, Energy, Maritime Security, and Critical Infrastructure: Is the QUAD Delhi Meet a Step Towards Reviving and Institutionalising QUAD?**



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The QUAD Foreign Ministers' meeting held in New Delhi on 26 May 2026 comes at a critical moment in global geopolitics, when the QUAD's efficacy and impact have come under severe stress in the recent past.<sup>1</sup> This was largely due to Trump's visit to China and the Trump–Xi rapprochement,<sup>2</sup> amidst the ongoing military conflict in West Asia involving Iran, Israel, and the United States, and the subsequent closure of the Strait of Hormuz, a critical chokepoint triggering volatility in oil and natural gas markets. It has become evident that war and conflict not only carry significant human costs but also reveal deep structural vulnerabilities in global economic and energy systems.<sup>3</sup> Further, the absence of a leaders' summit in 2025<sup>4</sup> and shifting geopolitical priorities of the US led many scholars and observers to see this as evidence that the grouping was losing momentum, suffering from institutional fatigue, and "struggling to define its purpose."<sup>5</sup>

Against this backdrop, the meeting of the foreign ministers of Quad members—Australia, India, Japan, and the US—at Hyderabad House in New Delhi served as a strategic reset in the QUAD's political reaffirmation and operational relevance, formalising structures of issue-based convergence across the wider Indo-Pacific. This was evident in the outcomes of the QUAD Foreign Ministers' Joint Statement,<sup>6</sup> which clearly suggests that

the QUAD is entering a new phase of revival with concrete deliverables in areas such as critical minerals, energy security, maritime surveillance, resilient supply chains, port infrastructure, undersea connectivity, and regional public goods delivery. Although the grouping continues to avoid formal alliance structure—a treaty framework or a permanent secretariate—still, it is increasingly moving towards deeper institutionalisation functionally through operational partnerships in domains of mutual interest.

Since its inception in 2017,<sup>7</sup> QUAD has largely been seen as a strategic response to contain China's growing assertiveness in the Indo-Pacific.<sup>8</sup> Thus, many of the groups outcomes have often been analysed from a prism of strategic balancing and military posturing, which will eventually lead to the formation of a so-called Indo-Pacific NATO.<sup>9</sup> But the QUAD never sought to be a NATO-like alliance and has steadily evolved beyond that framing. What emerged out of the New Delhi gathering is that the democratic grouping is increasingly shifting beyond strategic signalling towards a more pragmatic and constructive approach of practical cooperation and coordination in areas of mutual interest. QUAD therefore is a forum of strategic alignment between four maritime democracies<sup>10</sup> located at different ends of the Indo-Pacific that are not merely aligned on key issues but also have the ability to influence the global events. These countries find themselves strategically aligned on areas of mutual interest and the joint statement at the New Delhi meet emphasised this by drawing a framework of critical minerals cooperation, the launch of a new energy security initiative, the expansion of maritime surveillance collaboration, and the announcement of a pilot port infrastructure project in Fiji, pointing towards a more functional and outcome-oriented QUAD.<sup>11</sup>

This is not just a routine QUAD announcement; it is rather significant because institutionalising QUAD cannot be done only through declarations and vision statements. They evolve organically through mutual cooperation, issue-specific structured mechanisms, policy coordination, financing arrangements, and feedback or project performance audits. In this regard, the New Delhi meet has accelerated the revival of QUAD's institutionalisation not through formal architecture but through flexible, issue-specific coalitions that generate strategic depth through sustained cooperation and operational coordination.

This shift was vividly captured in EAM S. Jaishankar's opening remarks, who called the meeting not as a forum or platform for speech acts about problems but rather as an agency of action: "At the global level, we have to address issues like supply chain resilience, connectivity choke points, manufacturing and resource concentrations, and gaps in critical infrastructure. The Indo-Pacific has, in addition, its own particular concerns. This will require enhancing strategic confidence, ensuring maritime security, promoting economic choices, and fostering a deeper collaborative ethos. And that is best done by promoting trusted and transparent partnerships. Each one of them offers a new argument for more partnerships, stronger growth, and realising the promise of technologies."<sup>12</sup> Whereas Secretary of State Marco Rubio was more direct in describing the evolution of QUAD from "the most interesting thing about the QUAD is not simply that it is a gathering of four strategic allies in which we come together to compare notes about areas of common interest. It's also increasingly becoming a forum by which you begin to take action. Each of these four nations represented here today brings unique capabilities that collectively we can bring to bear on some of the most significant problems facing the world."<sup>13</sup>

### **Critical Minerals: Diversifying away from Concentrated Dependence**

One of the most pressing and perhaps the most strategically important announcements of the Delhi meeting was the QUAD Critical Minerals Initiative Framework among the QUAD partners, under which they have committed to mobilising up to USD 20 billion in government and private-sector support to strengthen critical mineral supply chains, including mining, processing, and recycling. It reflects a growing recognition among all four QUAD member countries that critical mineral supply chains are no longer simply economic concerns; they are strategic assets critical to national security.<sup>14</sup> They are the cornerstone of energy, economic, and military security. Defence equipment manufacturing and clean energy transitions both depend on reliable, affordable, and uninterrupted access to minerals such as lithium, cobalt, graphite, nickel, and rare earth elements. Thus, this framework is crucial for addressing strategic vulnerabilities and de-risking supply chains from concentrated dependence, especially on China, which, according to the Global Critical Minerals Outlook 2025, is the leading refiner, with an

average market share of 70% in 19 out of 20 important strategic minerals.<sup>15</sup> This vulnerability has become more acute as Beijing has deployed export restrictions as a coercive instrument amid its trade war with the United States.

The critical mineral initiative does not merely pledge coordination and cooperation; it will outline and identify specific projects within QUAD that are owned, operated and supplied to QUAD markets along with supporting and exploring export credit agencies, development finance institutions, mobilising private capita and other public supporting tools and commercial arrangements, streamlined permits, laws and regulatory mechanisms, as well as work towards enhancing recovery and recycling of critical minerals—through which the QUAD partners intend to accelerate the development of a diversified and fair supply of critical minerals that are crucial to the wider region’s economic growth and national security.<sup>16</sup> This framework clearly demonstrates the intent and kind of sustained policy coordination that distinguishes functional institutionalisation from rhetorical solidarity<sup>17</sup> which is evident in Japanese Foreign Minister Toshimitsu Motegi’s statement, who called the initiative “very important from the perspective of strengthening the supply chain of critical minerals” and announced its integration with Japan’s own POWERR Asia energy cooperation framework<sup>18</sup>—a strategic signalling that QUAD deliverables and frameworks are now being woven into bilateral and regional functional architectures.<sup>19</sup>

### **Energy Security and “Security of Energy”<sup>20</sup> amidst Volatility and Conflict**

The conflict in West Asia is a matter of grave concern to not only India, whose energy security is tied to the region, but all the other QUAD member states. Iran’s closure of the Strait of Hormuz, a chokepoint through which a major share of Asia’s energy supplies transits—has imposed, as Australian FM Penny Wong noted, “enormous consequences for our region’s energy security.”<sup>21</sup> Thus, the deepening of the energy crisis over uncertainty of maritime transit through the Strait of Hormuz and the rising insurance premium led to widespread economic and strategic vulnerability globally. This resulted in a strategic shift in QUAD’s approach to energy security, from seeing it primarily through the lens of maritime security through naval presence towards a more nuanced

understanding of the “security of energy”, that is, as the protection of critical maritime infrastructures and routes. Therefore, the QUAD, being a grouping of maritime democracies, the launch of the QUAD Initiative on Indo-Pacific Energy Security is timely and aimed at addressing both “energy security” as well as “security of energy”.<sup>22</sup>

For India, whose energy lifeline is dependent on the sea lanes and maritime domain<sup>23</sup> this is a critical dimension of the QUAD FM meet in New Delhi that aligns directly with its strategic imperatives and core national interests. New Delhi is a net importer of hydrocarbon energy resources,<sup>24</sup> and the import dependence, combined with its policy of resisting over-reliance on any single supplier, makes the QUAD’s emphasis on diversified, resilient supply chains under this initiative complement well with its long-standing pursuit of strategic autonomy—what its strategic culture frames as the *Madhyama Marg*, or middle path.<sup>25</sup> Thus, participating in a QUAD energy framework does not require India to abandon its relationships with Gulf, African and other oil and gas producers. It provides an additional layer of supply-chain resilience and mitigation of energy shock for its people without constraining sovereign choice.

### **Maritime Security: From Domain Awareness to Surveillance Collaboration**

The QUAD being a grouping of maritime democracies, are heavily dependent on the maritime domain for their prosperity and security. Thus, the maritime security framework announcements from New Delhi meet, outlines the most significant evolution in the QUAD’s operational posture since the launch of the Indo-Pacific Partnership for Maritime Domain Awareness (IPMDA).<sup>26</sup> The newly launched Indo-Pacific Maritime Surveillance Collaboration (IPMSC) moves the QUAD structurally beyond shared information and data frameworks to active coordination of maritime surveillance capacities and capabilities in the Indo-Pacific—with the initial phase covering the Indian Ocean Region and expanding the scope for wider Indo-Pacific in the future. In this regard, the development of a Common Operational Picture (COP) is a proactive step towards enhancing transnational security through the maritime domain.<sup>27</sup>

The joint statement also called for the importance of adherence to international law as reflected in the United Nations Convention on the Law of the Sea (UNCLOS) with respect

to navigational rights and freedom and safety of open and uninterrupted flow of global commerce and energy resources through the Hormuz Strait and the Red Sea region.<sup>28</sup> The delegation unequivocally condemned the attacks on commercial shipping vessels, and critical maritime infrastructure and opposed any future actions by any actor that are inconsistent and contradictory to UNCLOS, including imposition of tolls for passage through the Hormuz Strait.<sup>29</sup> With India sitting right at the strategic junction of the maritime trade and energy flow within the Indo-Pacific construct, it provides it with the leverage to be the operational pillar of the QUAD's maritime security and surveillance priorities.

### **Critical Maritime Infrastructure: Strategic Institutionalisation through the Fiji Port Project**

The most important and strategic takeaway from the New Delhi meet is the QUAD's growing focus on critical maritime infrastructure which signals a genuine attempt towards institutionalisation of the QUAD through the QUAD Ports of the Future Partnership pilot in Fiji.<sup>30</sup> This initiative marks a watershed moment when for the first time the QUAD partners have committed jointly to a physical infrastructure project. The initiative of the Fiji pilot port project is very strategic and comes at a time when critical maritime infrastructures such as ports, undersea cables, logistics and connectivity corridors and energy installations are increasingly under strain amidst ongoing geopolitical competition across the Indo-Pacific and marks a departure from speech act into tangible outcomes. The cooperation in the field of critical infrastructure is notable as it creates the ground for the consolidation of institutionalisation, as it requires financing, coordination, implementation mechanisms, governance, maintenance, and long-term political commitment.

The geostrategic design for such an initiative is clear to contain China, which, through its Belt and Road Initiative (BRI)<sup>31</sup> has already made deep inroads through its swift, smart, and fast delivery of infrastructure projects across the length and breadth of the Indo-Pacific, including the Pacific island states, which pose severe geopolitical and strategic implications for the QUAD partners. The Fiji pilot port project offers Pacific Island states a transparent alternative to Beijing's strategic financing and debt trap models.<sup>32</sup> FM of

Japan Wong, who visited Fiji weeks before this ministerial meet in Delhi, described the pilot project as “a practical demonstration of our collective ability to deliver high-quality resilient infrastructure in partnership with the region and in response to Pacific priorities.”<sup>33</sup> For India, this pilot project opens a wider strategic opportunity not only in the Pacific island states but also across the wider Western Indian Ocean region, East African littoral, and island states, where ports, undersea cables, critical maritime infrastructure, and connectivity are increasingly shaping regional geopolitics. Therefore, the emphasis on constructive partnership and proactive responsiveness, rather than strategic imposition as witnessed in BRI model, reflects a diplomatic posture that distinguishes QUAD’s critical infrastructure initiative from the opaque conditionality concerns associated with BRI projects.

### **Conclusion: Revival and Institutionalising Quad**

In conclusion, it can be said that the Delhi ministerial meeting of QUAD constitutes a revival of institutionalisation as the grouping which never stopped working but rather was in a state of dormancy in the recent past amidst ongoing tensions, tariff wars and geopolitical realignments.<sup>34</sup> Nonetheless, the QUAD partners have coordinated year-round across various working groups, and a case in point is that this FM meet was the third in the past 18 months.<sup>35</sup> This was evident in the joint statement issued in New Delhi on 26<sup>th</sup> May, which outlines a list of ongoing initiatives—from Open RAN deployment in Palau to HADR coordination in Papua New Guinea and Myanmar—that demonstrate sustained operational continuity regardless of the summit-level optics and absence of a leaders summit in past years.<sup>36</sup> Therefore, what the Delhi meeting achieved is not revival but deepening of partnership in a highly fragmented world. The QUAD’s structural challenge is posed by its informal architecture, but this is its biggest strength that provides the QUAD partners the flexibility to work towards demonstrating capacity and enhancing capability to quietly and consistently deliver regional public goods and attain strategic objectives. And the four critical pillars of the Delhi meet demonstrate that this capacity is expanding and is being increasingly institutionalised with dedicated working groups coordinating and cooperating across minerals, energy, maritime surveillance, and infrastructure. The joint frameworks of QUAD partners clearly articulate shared principles

and specific implementation pathways to streamline co-financed projects that create the kind of flexible, durable and strategic web of equitable interdependence that cannot be dissolved by a single event or leadership transition.

For India, the New Delhi foreign ministers' meeting did more than revive momentum around the QUAD; rather, it guided the grouping's future direction towards institutionalisation. It allowed New Delhi to participate fully while maintaining its strategic autonomy and multi alignment. For Australia, it allows them to hedge against an unpredictable Washington while deepening regional trusted and transparent partnerships and allows Japan to pursue an Indo-Pacific strategy that puts a premium on stability without the constraints of a formal collective defence commitment. Thus, the New Delhi ministerial meet marked a clear path that QUAD may not be formally institutionalised, but it is increasingly behaving as one in practice.

### **Declaration**

I declare that this manuscript is being submitted exclusively to CENJOWS for publication consideration, is original, and has not been published or submitted elsewhere. I further certify that it contains no classified, restricted, or sensitive information and is based entirely on open-source material suitable for publication in the public domain.

## ENDNOTES

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