

The Quad 2026: reports of its death are wrong

By Vir Kamath October 26, 2026

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The Quadrilateral Security Dialogue (Quad) – comprising the United States, Australia, Japan, and India – convened in New Delhi on May 26, 2026, chaired by Indian External Affairs Minister Dr S Jaishankar. The 2026 summit produced more concrete deliverables than previous engagements, specifically on technology, supply chains, and critical rare earth minerals. This follows a turbulent 2025 period that featured Trump's "America First" policy and US-India trade frictions, which raised doubts about the Quad's relevance. The summit serves as a crossroads for the group's credibility amid rising energy prices, the Iran War, and Chinese economic dominance.

As the summit's outcomes demonstrate, fears were overblown. Despite US-India friction over tariffs and continued Russian oil imports, one core interest keeps the Quad aligned: offsetting Chinese dominance in the Indo-Pacific region.

The Fiji Port investment project, announced in New Delhi as a regional logistics hub, is the clearest evidence of the Quad's renewed intent. Fiji's centrality in the Pacific serves as a natural point of convergence for Australia, Japan, and the US Navy, while its demographics (up to 35% of Indian Origin) add a strategic dimension for India. The project is centered on improving the capacity of Fiji's overcongested ports of Suva and Lautoka, which handle 90% of national imports, with the US State Department confirming that "the Quad countries will work together with the Government of Fiji."

The initiative is also designed to counter China's economic and supply-chain hegemony in the Pacific. A deep-water port will help the Quad demonstrate that it can provide the Pacific Island nations a more resilient development alternative to Beijing's Belt and Road Initiative.

Beyond the annual Malabar Naval exercises, the Fiji Port will also support civilian disaster relief

operations under the Indo-Pacific Logistics Network (IPLN), improving surveillance across a critical maritime checkpoint. The Fiji Port announcement coincided with India's "Great Nicobar Project" in 2026 which seeks to build a Naval Base and Commercial Port in the Nicobar Islands.

This is significant, given the implicit implications of a dual Fiji-Nicobar strategy in counterbalancing Chinese naval activities across both the Indian and Pacific Oceans. The Nicobar Port is viewed as India's "Hormuz Leverage" given its 40 nautical mile proximity to the Strait of Malacca through which over 70% of China's oil passes.

The Quad also agreed to invest $20 billion to diversify rare earth critical minerals sources and processing to avoid a Chinese monopoly, a well-founded concern. China controls 61% of global rare earth production and 92% of its processing, and has weaponized it twice against Japan in 2010 and 2026 over disagreements over the Senkaku/Diaoyu Islands dispute and Taiwan.

This converts rare earth minerals from a trade problem to a national security vulnerability for every Quad nation's defense and semiconductor supply chains, which run through Chinese refineries. Under these circumstances, India becomes the Quad's long-term solution as it possesses the world's fifth-largest rare earth reserves – 13.25 million metric tons of monazite containing an estimated 7.23 million metric tons of rare earth oxides – but processes negligible amounts domestically.

The India-US Critical Minerals Framework, combined with the Quad's $20 billion investment, is a step toward mitigating China's leverage, supported by a dedicated Rare Earth Corridor comprising the mining states of Odisha, Andhra Pradesh, Tamil Nadu and Kerala which all contain adequate extraction plants. India's investment of approximately $76.3 million under the "Scheme to Promote Manufacturing of Sintered Rare Earth Permanent Magnets" (REPM scheme) simultaneously incentivizes private manufacturers to enter the value chain from oxides to finished magnets, whilst the state-owned KABIL joint venture is procuring overseas supplies through agreements with Argentina, Mozambique, and Norway. Together, these steps could make India a critical enabler for Quad's mineral processing and an alternative to Chinese mineral weaponization.

Quad critics question its relevance while its defenders label it a strategic alliance; it can be better interpreted as an invisible strategic partnership of convenience yielding productive deliverables. Alliances like NATO are tangible because its Russian adversary is overt which forces members to share binding treaty obligations. The Indo-Pacific, however, lacks the overt adversary: China is simultaneously the largest trading partner and primary security threat for all Quad members. An overt anti-China bloc would destabilize the region, force ASEAN into alignment with either China or the Quad, and provoke PLA Navy expansion beyond the Nine-Dash Line.

The Quad's minilateral structure is durable. Unlike an Article 5 Alliance, which binds member states to collective defense and carries genuine deterrent weight, a minilateral group like the Quad would struggle to overtly deter Chinese behavior. At this stage, Chinese conduct has not crossed the threshold that would necessitate binding commitments, although the Quad's structure leaves room to evolve should that threshold be reached.

The Quad's strength lies in its ambiguity: conducting maritime surveillance without calling it containment, building infrastructure without

labeling it as competition, and pursuing mineral diversification without calling it decoupling, all in the 2026 Joint Statement. Although it operates without a formal intelligence-sharing treaty or GSOMIA equivalent, New Delhi's summit yielded the IPMSC (Indo-Pacific Maritime Surveillance Collaboration), shifting the group toward joint maritime patrols and achieving interoperability without the diplomatic provocation of formal pacts. Although this did not lead to a Leaders' summit, it reaffirmed the Quad's "convergence without a bloc" posture.

The Quad is not a traditional alliance; it converges to deliver results while each member retains its autonomy. Despite India-US tensions in 2025, the absence of a Leaders' summit, and even as tariffs and Russian oil imports strained bilateral relations, the operational machinery continued its work. The IPMSC and critical minerals framework advanced irrespective of internal tensions, showing the Quad's resilience. This resilience, paired with the absence of a treaty or named adversary, complicates Beijing's calculations; with no overt bloc to counterbalance, China cannot easily judge whether to respond with diplomatic engagement or further naval expansion.

To sustain this momentum, four policies are essential.

1. First, the Quad must continue to hedge between the bilateral hub-and-spokes model preferred by the United States and the multilateral summit format. This will help institutionalize working-level coordination, which transcends leadership changes.
2. Second, the frequency of joint naval exercises must increase beyond Malabar to operationalize the IPMSC across both the Indian and Pacific Oceans.
3. The agreements of 2026 require acceleration, not aspirational rhetoric; privatize India's rare earth processing corridor and the Fiji port before Chinese dominance becomes intractable.
4. Finally, the Quad should formalize disaster response units beyond joint naval exercises. Building on tabletop and IPLN exercises, a standing framework would provide the grouping with a low-controversy pillar relevant to Indo-Pacific Island states, nullifying accusations of containment. It must take forward the Humanitarian Assistance and Emergency Response plus the Indo-Pacific Partnership for Maritime Domain Awareness (IPMDA) frameworks discussed in New Delhi.

Ultimately, the Quad is neither NATO nor AUKUS, which is precisely why its effectiveness is rooted in its flexibility.