

John Helmer: China's Unthinkable Move, Iran's Response to US

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#Nima

Hi, everybody. Today is Tuesday, May 5th, 2026, and our dear friend, our brother, John Helmer, is here with us. Welcome back, John.

#John

Thank you for having me, Nima. Good to be back.

#Nima

John, what do you make of Operation Freedom that Donald Trump has announced? And yesterday we had some sort of chaos in the Strait of Hormuz, and they were trying to send these tankers, making some sort of chaos and trying to force these tankers to pass through the Strait of Hormuz, through the pathway that the United States tried to define as a safe path close to the Omani shore. And it has failed, and they couldn't achieve it. But how did you find it? What was that, in your opinion?

#John

I think what we're seeing is a series of measures that Trump has agreed on with his military and with the civilian leadership — so Vance, Marco Rubio at State, and the Treasury — to appear to be offering a peaceful track, and preparing the kind of provocations for Iran so that if the, quote, peaceful track is contested, Trump can claim that Iran opened fire, provoked violence, and triggered the kind of massive attack that he's been assembling his forces to do and has been preparing for some days now. On the one hand, it's essential to Trump psychologically, personally, and politically to show that he's winning. And I draw everybody's attention to this near-mad tweet that the White House has put out.

I've published an analysis of it in Dances with Bears, JohnHelmer.net, this morning, in which Trump is shown to be saying the word "winning." And this is repeated once a second, repeated over one

hour and 18 seconds. That's 3,600 repeats of the word "winning." Now, such an act is symptomatic of degeneration — psychopathological degeneration, neurological illness — on the part of Trump. But let's leave aside that and treat it as a rational display of his need to demonstrate to his voter base that he's winning. Just bear in mind, folks, that as we've been saying for some time now, if the Republicans lose control of Congress, Trump faces, after November 3, and certainly when the new Congress assembles, not only a majority for impeachment but a potential supermajority for the invocation of the 25th Amendment of the United States Constitution.

That's the Declaration of Presidential Disability. We're facing that, meaning he knows he's facing that. That's pretty grim. This tweet "winning" is symptomatic of what he needs politically. And I think that the attempt to show a military success in escorting vessels out of the Hormuz with prearrangements is— a very valuable Greek source I have is suggesting to me this morning that some of the background negotiations are setting up vessels in coordination with the US that were already planning to move out with Iranian permission. In other words, there are a variety of secret set-ups to make it look, for Trump to show, that his military guidance, military escort policy is working when it isn't.

Okay? Now, if on the other hand it fails, as you've correctly said it will and it is, Trump is looking to have a kind of Gulf of Tonkin provocation. That is to say, to make it clear that he's not to blame — the IRGC opened fire, broke the ceasefire, leaving him no alternative but to launch a massive attack, which he's been assembling and which his military advisers are suggesting, including Vance, it's reasonable to suspect, will be believed to be likely to fail in its war objectives, likely to cost in U.S. losses. But nonetheless, Trump wants to show he can win by violence what he failed to achieve yesterday by negotiation, either way.

Of course, this isn't a Gulf of Tonkin setup as Lyndon Johnson attempted to set up with the Vietnamese, because the U.S. is already at war with Iran and we're in a ceasefire. The war has already started. So we face a setup in order to justify resumption of an offensive. So we've got a double track, just as we have two tracks — the Oman side and the Iranian side out of the Hormuz. And essentially, we're having a shadow play for two tracks to achieve two purposes together, summing up to one mad doctrine — mad in the neurological sense, mad in the psychopathological sense — that Trump has repeated, "winning," repeated 3,600 times on the White House website.

#Nima

Yeah. Yeah. John, here is what the head of parliament in Iran tweeted. He said, the equation of the Strait of Hormuz is in the process of being solidified. The security of shipping and energy transit has been jeopardized by the United States and its allies through the violation of the ceasefire and the imposition of a blockade. Of course, their evil will diminish. We will fully—now, we know full well that the continuation of the status quo is intolerable for the United States while we have not even begun yet. And we've seen what has happened to the UAE yesterday.

Iran simply is defining two lines, and these two lines can be seen in this picture — two yellow lines. And it goes to the western part of the Strait of Hormuz and comes to the eastern part of the Strait of Hormuz. It includes those two important ports of the UAE, which they wish they could use after getting out of OPEC and the GCC. They can sell more oil and energy by using these two ports. But it seems that Iran effectively is, you know, removing that opportunity for the UAE. What is the game there, in your opinion?

#John

You're asking me to talk about Arab-Iranian politics. I'd better not go that far.

#Nima

No, I'm talking about not Arab-Iranian. I'm talking about how the UAE is getting closer to Israel and the United States in order to somehow feel that this way can improve their position, the situation they're in right now.

#John

Well, that is an Arab politics question. It's clear that the UAE has suffered far greater losses than it ever anticipated. And each of the strategic directions in which it was planning — a strategic direction with Prime Minister Modi's India, for example — that would have established the UAE with India as the sort of Persian Gulf anchor for the IMEC, the India-Middle East-Europe corridor to Greece and then onwards to Europe. That entire trade corridor has collapsed. The UAE's attempts to neutralize or equalize its political reach compared to Saudi Arabia have collapsed.

It's suffered significant strategic damage to its economy — both tourism, as a trade hub, as a financial hub. All of those things have been strategic losses. So it's got nowhere to go except towards the United States. And it's obviously a significant problem if Iran basically demonstrates to the UAE that if you go in that direction, we'll stop you, we'll punish you, we will inflict a cost on you that the US can't compensate. That seems to me to be the position. Do you disagree with that, or do you see it differently?

#Nima

No, I don't see that the UAE can understand the situation they're in right now, but I feel that somehow other GCC countries like Qatar and Saudi Arabia, they don't know what to do — mostly Saudi Arabia. They're trying to manage their position, but they can't find a solution for that.

#John

They've got to manage their position by balancing against the U.S. with Iran. They've got to do more balancing than the UAE is capable of showing it can do right now. That's true. What I can refer to here is that Foreign Minister Araghchi has tweeted this morning, as I understand, the following statement, and it's a puzzling one to me, but I think it connects to Iranian calculations about Arab politics too. Araghchi said this morning by tweet, as talks are making progress with Pakistan's gracious effort, the U.S. should be wary of being dragged back into the quagmire by ill-wishers. Now, I'm not aware that the talks are making any progress at all. In fact, so far our conversation has focused on attempts by Trump to lead us back into a post-ceasefire war situation or a post-ceasefire Hormuz regime, which he's calling a victory.

I don't see that the talks are going anywhere at all, on the U.S. side or on the Iranian side, though from an Iranian point of view the talks are making progress because the U.S. is not advancing its negotiating stance. What I don't understand is, the U.S. should be wary of being dragged back into a quagmire by ill-wishers. Is that a reference to Israel? Well, that's not a reference—it's a peculiar way for the foreign minister of Iran to refer to Israel. It's an intimate ally of the United States; it's hardly an ill-wisher. Both of them are exactly the same towards Iran at this point. Is the ill-wisher the UAE? Is it Saudi Arabia? Is it Kuwait? Is it Qatar? Is it Bahrain? More likely Iran.

#Nima

John, here is what was published in the Financial Times. It shows that the loss of oil supplies throughout history, you see, goes back to the Iran-Iraq war, the Iraq war, and Libya, and it all comes to the Strait of Hormuz right now. It's not even comparable, what's going on right now with the Strait of Hormuz. And when, because whatever comes to the mind of these people in Washington—you mentioned that they're preparing for a new attack, which is actually what is happening.

If we want to be logical about what's going on in the Middle East, you see that they're gathering, they're bringing a lot of, you know, weapons to the region. They're preparing for a new attack. That's, I think, the fact from what we've seen so far. But how is that going to solve or resolve the problem they're facing right now with the Strait of Hormuz? This is the biggest problem of the Trump administration. And you mentioned Araghchi. Araghchi yesterday said they're not even talking about the Iranian nuclear program anymore. That's not on the table anymore.

#John

Well, remember, we did try to explain it last time. It's the third stage of the negotiation as Iran spelled it out. First stage and second stage are ceasefire negotiations—peace in the region, particularly to stop Israel's further attacks in Lebanon. The second stage is the Hormuz. Nuclear talks are our third stage, but we are stuck in the first and second stage. So that's where we are in Iranian terms. And the U.S. is basically having the initiative taken away from it, inasmuch as we're at

the first and second stage—ceasefire and Hormuz regime. Let me just go back to the bigger question you raise of how does the U.S., or how does the Trump administration, or how does the White House calculate it can make gains in a situation that you've just described as almost certainly a losing one?

Well, let's just look at the way in which, technically, a White House at the beginning of the driving season and the midterm elections thinks. The way a White House thinks is in terms of polls. It measures how to translate votes into power, how to convert displays of power into votes. Now, right now, this week, the latest average of opinion polls—public approval of Trump—he's losing another percentage point or 1.5 percentage points. What does that mean? Well, just bear in mind, he allegedly was the target of an assassination attempt only a few days ago. So let's just say he got no benefit from being attacked. No rally around the flag. No sudden mobilization of undecided voters in sympathy.

There is no sympathy vote left for Trump. The undecided voters who are neither identifying themselves as Republicans or as MAGA—let's call them hard Republicans—or as Democrats are increasingly polarized. And Trump gains nothing from any domestic issue. His disapproval rate for inflation—wait for this—his disapproval on inflation policy is minus 39%, minus 39%. Well, there's the answer to your question about the oil shortage coming out of Hormuz. It's translating directly into massive disapproval among U.S. voters, a fear of inflation. So that, in turn, is pulling down Trump's approval, increasing his disapproval, and as that gets worse, approval of military action against Iran is getting more negative.

So there's only one way out that Trump can think of winning, as we just explained, and that's to position himself as either having been provoked or to position himself as, in some sense, achieving a victory. Now, how is he going to achieve a victory right now? Let me make a prediction which all our audience can consult me for in a few days' time, May 14. On February 25–26, remember, 48 hours before the U.S. and Israel launched their attack, their war on Iran, Prime Minister Modi of India went to Israel, and in the Israeli parliament, he announced "Am Yisrael Chai," which is an Israeli Jewish war cry, a very ancient one, and it means to the Israelis that the Indian government was backing their war.

My own view is that this is what Trump intends to do with President Xi Jinping of China on or about May 14 or 15. In other words, Trump is going to announce that his principal strategic adversary in the world, China—against which most of the Pentagon policy planners devise war plans, economic sanctions plans, long-term strategic containment plans—China and the United States will be in a hug. That's what Trump promised Xi. And if there's to be a new attack on Iran, Trump is going to do it as if under Chinese approval, in the same way that Indian approval was conveyed by Modi on February 26.

So watch for May 13, 14, 15. Trump arrives in China May 14, 15. Let me add a few things to indicate just where China is right now. For the time being, the foreign ministry has stopped giving daily

briefings. We're on Tuesday. There hasn't been a Chinese daily briefing at the foreign ministry since April 30th. That's last Thursday, if I've got my dates right. Clearly, Wang Yi, the foreign minister and a Politburo member, so very close to President Xi in a way that other ministers of state are not, had a phone call with Secretary of State Blinken on April 30, and I'm looking at the so-called readout. Listen to what it says in the context of the plan of U.S. attack on Iran and the plan of U.S., let's say, guidance, freedom operation, attempt to force open the Strait of Hormuz.

With those in the back of our minds, listen to what Wang Yi says. This is the foreign ministry's version. He says, Wang Yi says, the head-of-state diplomacy, meaning Trump and Xi, has always been a stabilizing anchor for China-U.S. relations. Under the strategic guidance of Xi and Trump, China-U.S. relations have generally remained stable. Generally remained stable? Who thinks that about the conduct of U.S.-Chinese relations for the last two years? Wang goes on, remaining stable, which serves the fundamental interests of both peoples and meets the common expectations of the international community.

Both sides should maintain hard-won stability, make good preparations for the important agenda for high-level interactions, expand cooperation and manage differences, explore the building of a strategic, constructive, and stable China-U.S. relationship to achieve mutual respect, peaceful coexistence, and win-win cooperation. That's the Chinese carrot. That's the bilateral Chinese carrot. In Russian terms, that's what President Putin keeps saying was the Anchorage formula: build economic cooperation with the Trump administration. But now listen to this part, because that's the part that's been emphasized in the anti-Chinese media in Europe.

Wang Yi underscored that the Taiwan question bears on China's core interests and is the biggest risk in China-U.S. relations. The U.S. side should honor its commitments and make the right choice to open new space for China-U.S. cooperation and make due efforts for world peace. In my interpretation of that, what's Wang saying? Wang is saying, you stop escalating on Taiwan as a threat to us, and we will swap your withdrawal from the Taiwan Strait for our withdrawal from the Hormuz Strait. Of course, he doesn't say it exactly like that, but bearing in mind the international context, bearing in mind the significance of the Hormuz Strait for China-Iran oil dealings, what is Wang saying? He's saying nothing about the instability, his term, that that war is creating for China.

What he is saying is China's ready to make a deal with Trump if Trump satisfies China on Taiwan. And that, from a Trump point of view, is going to be an easy deal to make. And if that's the deal coming up, of course, it'll be words. There'll be American words, and China trusts American words just like Russia and Iran do. If that is the deal that comes up, we have to beware of the possibility that Trump will use China cover now, not simply Indian cover, to resume war. I think that's what's going on. I think that's where we're headed. And I'm sorry it'll disappoint so many of our audience who want to believe that China thinks differently about Iran. I'm glad to hear that Foreign Minister Araghchi is about to go to China.

#Nima

He's on his way because right now we've learned the breaking news that he's on his way to China.

#John

Fine, so we can bet our bottom dollar that when he gets off the plane and comes to meet Wang Yi, guess what he's going to ask? He'll ask exactly the questions that I've just raised.

#Nima

Yeah. My understanding of the situation between China and the United States, I think, is much more complicated, John. It's not just about the Strait of Hormuz or the case of, you know, Taiwan. It's about what's going on in Indonesia and how the Malacca Strait is in play right now. And China knows that. After all, they cannot—because look at what has happened in Anchorage. What has happened? What was the outcome of that meeting? You mentioned they're literally following Russia with the Anchorage meeting with the United States. They want some sort of big deal with the United States, but the United States is not capable of giving that to anybody.

Because the mindset in Washington is hegemony. It's not about cooperation and partnership. This is the problem. I think Russia and China fully understand the position of Washington. They don't want to talk as partners. They want to talk as a hegemon. They want to force China into a position, in my opinion. And with the case of Taiwan, look at what is going on in the Strait of Hormuz, John. How can someone imagine that the United States would be able to make problems for China in Taiwan? The United States militarily is not there anymore to make problems for these countries.

#John

Well, I differ there. In the first place, from a Chinese point of view, from a Russian point of view, U. S. policy is to rearm Japan, just as it is in Europe to rearm Germany. And guess who the targets of Japan's remilitarization are? They are Russia.

#Nima

How long does it take, John? How long does it take to rearm Japan? They don't have it, John.

#John

I differ. The Japanese can rearm very quickly under the present regime. But if you're saying the potential risk to China, the potential risk to Russia is a fair way off, that's true too. But in the meantime, what China has been very clear about is that the remilitarization of Japan is a very serious new risk, first. Second, the same is said about South Korea, and the same is said about the Philippines, and the same is said by China and supported by Russia too, and by Russia's strategic relationship with North Korea. All of those relationships are in play, just as you've said. It's a

complicated situation. Nonetheless, what we're talking about here is the readiness of President Xi. I'm not talking about the Chinese military, and the readiness of President Putin.

I'm not talking about the Russian general staff, but to believe that a deal with Donald Trump and his associates benefits them politically at home and abroad. So we're now talking factional politics, factional politics in Russia, where the Anchorage formula is exactly as you said, repudiated by Foreign Minister Lavrov, who said exactly what you've just said. The U.S. promised an Anchorage formula on which we agreed as gentlemen. What do we see instead? Escalation of sanctions. What we see instead is hegemonic behavior by the United States. So we agree, Nima, that's exactly what Lavrov said, and it's exactly the language he used. President Xi doesn't speak in such clear language, and Wang Yi doesn't speak in clear language at all, except for particular targets. And they're the literal Chinese coast targets.

Japan, the Philippines, Taiwan, and maybe secondarily South Korea. So what does that add up to? It adds up to a commitment on the part of some factions associated with President Xi, exactly as Wang has said. They're trying to make an, as it were, Anchorage formula for China. It's valuable to their domestic political calculation. It reflects the same kinds of calculation that we can see bitterly argued in Moscow, though argued behind closed doors to some extent. We're seeing factional politics. So I don't think it's fair to say China thinks this, Russia thinks that, the U.S. thinks the other thing. I think we're dealing with, as you said, Nima, a complicated situation. But right now the players—Wang, Xi, and Trump—are getting ready to make a deal. We can say, and I agree with you, what has Russia achieved since Anchorage on any front?

Shall we list them? The war is not going so well on the ground in Ukraine. There is no negotiated agreement of any kind from the U.S., or from the Europeans or the Ukrainians, on the future of Donetsk, Lugansk, the four regions, and going westward—a long-term security plan. And the war is, in fact, going not as well as we believed it would, and as so many podcasters figured and predicted it would. The electric war is failing to support the collapse of the front and failing to weaken Zelensky in Kyiv. The negotiations with the United States are failing on every front. The most recent attempts to normalize between the State Department and the Russian Foreign Ministry have collapsed. Why?

Because the United States has suddenly announced it's going to compel that the children born of Russian diplomats in the United States will have to have U.S. citizenship. Forcing U.S. citizenship on children of Russian diplomats is a very peculiar thing for the Trump administration to represent. It's a direct threat and provocation to Russian diplomacy in the United States. It's even more of a threat than closing the doors and barring the fence of Russian property—the dacha in Virginia, the consulate in San Francisco, and what have you. Everything you can think of that would normalize between the United States and Russia has failed. So what are we left with? What are we left with? Nothing. Nothing from the Anchorage formula.

Why would the Chinese, why would Foreign Minister Wang? It's not my opinion, folks. I just read it out. This is Wang's opinion that if the U.S. can reach some sort of Trump goal, Xi bug over Taiwan, everything else can fall into place. We'll call that the Beijing formula, just like we called it the Anchorage formula. Why do the Chinese think they can make such a deal? I'm repeating, in fact, your skepticism. But there it is, black and white. Now, when Mr. Arachi goes and meets with Wang, let's see what happens. Mr. Arachi comes away thinking, and what he says, and let's see what Mr. Wang says, since we are approaching the bigger priorities. That's what Wang and Lavrov have agreed. China and Russia are the biggest relationship in the political world right now.

#Nima

John, on May 3rd, China instructed domestic companies not to comply with the United States sanctions targeting several Chinese refineries linked to the Iranian oil trade. Yes. This is, you know, we've seen, because I see a drastic, you know, some sort of big difference between China and India. I see China more pragmatic and strategic when it comes to these sorts of wars. We've seen that in Ukraine. China was different. India was playing the same. Look at India during the war in Ukraine. They were the same. They basically didn't go to Kiev. The guy is the same. You don't see any sort of difference. Even though they're so dependent on Russian energy, India.

But you didn't see that in the sort of relationship of Modi, the behavior of Modi and his government. But the China case is different. China is somehow totally dependent on oil and energy and is forming some sort of partnership, I would say, in that region they're living in. They need Russia and Iran as much as Russia and Iran need China. The United States is coming from the outside. I know how important the trade with the United States is, and nobody can ignore that. But after all, I see the strategy in China much more strategic, much deeper than what we've seen with the case of India.

India somehow is playing, is trying to sit at the same time on four points, seats, or four chairs, and that doesn't make sense for anybody. The way that we've seen with the case of Turkey with Erdogan, these guys are not winning. They're trying to be right in the middle to gain from both sides. But after all, China is not that player, in my opinion. And I don't see any sort of positive. Donald Trump may go there. Donald Trump is not in a good position. He doesn't have the cards, as he mentioned, because he wants, with what's going on in the Strait of Hormuz. To be honest, I think it's all about Donald Trump's position when he goes to China.

He knows that these sort of attempts in the Strait of Hormuz would somehow fail, but he wants to give his best to open up the Strait of Hormuz, to have some sort of course when he goes to China. Is that happening? I don't see that happening. And China knows, perfectly knows, he wants the United States to be in the weakest position they've been so far to go to China and to put them the way that the United States is today in terms of military power, domestic issues, and what's going on domestically with Donald Trump. You've mentioned that. And they want to play that in the face of Donald Trump. They want to confront Donald Trump with all these cards they have.

#John

I'm sorry, I don't see that China has the cards that the Chinese say they have. For everyone's benefit, I went through a number of so-called Chinese analysts who are popular in the English-language media. That's in Dances with Bears yesterday. And their opinions are exactly the same. They think, and I'm simply quoting them if you want to read them, Hua Bin, so-called Professor Zhang, who appears on YouTube, and a new one called China Arbitrage or China. They all think that China is winning World War III. They think that Chinese military superiority is so great that, without fighting, which is expensive, they can demonstrate not only military superiority but technological superiority.

They believe that Chinese industrialization, Chinese command of logistics, Chinese command of everything in the economic relations between powers is so great they have won World War III. They actually state this, and they believe it to be true. They therefore say, it doesn't matter to us what happens to Iran; we will buy oil where it's cheap for us. They have essentially a hegemonic scheme that's purely Chinese, and they think that with the U.S. they can achieve a sort of coexistence of hegemons. That's their line. Now, it's thoroughly expressed in detail. One doesn't see the detail, the arguments, the military analysis, the economic analysis, the logistic analysis on the part of senior officials. These are the propagandists for those officials, okay?

They're filling in the gaps of what's left vague by President Xi and Wang Yi. But what comes out of their analysis, what comes out of their presentation and propaganda, is the conviction that China is winning its version of the world war, and they will accomplish this at the expense of everybody else. And this explains their version of why they've done nothing to assist Cuba, nothing to assist Venezuela. They even claim they don't have proxy military relations. Of course they do. They're using Myanmar, Burma, as a proxy state to attack and begin major arms and weapons supply systems to the northeast of India. They do what they think suits their interests best. But they don't want a military conflict with Taiwan. They want a deal with Trump. This is the way they think.

Fine, if they want to come on and explain to us all—because several of them do appear on podcasts and explain to us all why their intelligence is so superior to ours. But they have hegemonic ambition, and they think they're winning their war. Okay, so in this situation, you've expressed very well, I think, an Iranian point of view, a Middle Eastern point of view of why they're more vulnerable than they think they are. Understandable. I can express what is increasing Russian skepticism of China's ambitions, China's manner of expression, China's unwillingness to commit itself in partnerships that it has long expressed rhetorical support for, but not practical support for. So what we're expressing here, I think, is not the Chinese view of themselves, but the view we have that's skeptical of the Chinese view of itself. Reasonable, we all differ.

#Nima

Yeah, but after all, I think we had these sorts of doubts when the war in Ukraine started. And we were talking about, is China supporting Russia? Is China helping Russia? How are they going to manage the relationship they have with the United States? But I think as time went by, we've learned that China is literally supporting Russia. They know what they're doing. They know what the objective is. I think the question here is, what are they going to get from the United States? Taiwan, I think, is nothing for China. Taiwan is gone.

#John

Sorry, that's not... I don't agree with that.

#Nima

No, no, I'm not talking about that.

#John

Taiwan is everything to China.

#Nima

Yeah, it's everything. It's everything. But it's in the hands of the Chinese right now. They don't need to do anything with the United States. They don't need anything from the United States. The United States is not able to do anything in Taiwan. Just imagine, Taiwan is an island, John. What can they do in Taiwan against China? Nothing. The United States is not going to be able to. No, they started all these wars in Ukraine, in the Middle East, in order to put pressure on China. If we don't see the big picture, we miss this. You know, these are not isolated events in Ukraine and in Iran right now. These are all connected. I don't know how you feel about the Chinese sort of understanding of what's going on.

#John

Well, I think we don't disagree. It's just that we're looking at the bigger picture from different angles. In my view, Iran has already decided it can fight by itself with the limited support that it gets, first from Russia and secondarily from China. But none of us are in a position, not Westerners, to say, nor is Iran prepared to say in detail exactly what's being provided and what isn't being provided. I think that Russia takes the view that it's fighting by itself in Ukraine against the U.S. and its allies. It's had very substantial support from North Korea.

The nature of its support, its relationship with China, is external to Ukraine. And it's an important relationship. It's a very important economic relationship. But increasingly, one sees in the foreign policy think tank circles increasing skepticism towards China as a strategic partner. And you can see

there have been, and I've spoken of it before, significant differences, not itemized, that Sergei Lavrov, the foreign minister, has identified previously after speaking with Wang since December, that these differences, also not specified, have surfaced with the president's spokesman, Yuri Ushakov.

So I don't want to—we can't—it's not a good idea to skate superficially over these deep problems. But I think when we look at the war Russia is fighting against all of Europe in Ukraine, plus the United States, we don't see significant Chinese support. And arguably, from a Russian point of view, the support, the relationship with China is important as China becomes the alternative to Europe for Russian trade. I think we're talking a bit at cross purposes. I don't think we disagree, but I think we are underestimating what the Chinese think of themselves and what they think is their superiority over the rest of us.

#Nima

How?

#John

No, they say so. They say it. They actually say their analysis of their logistic command of world trade. They say it. I mean, I've spelled out, quoted in yesterday's **Dances with Bears**, exactly how they think. Exactly. You could say, well, this is not exactly representative of Chinese policy. Well, all one has to do is come up with a different version of Chinese policy, and I haven't seen it.

#Nima

Let me put it this way, John. Let's assume that the United States would be able to do something in Taiwan, in Ukraine, which failed. In the Middle East, it's failing. What is the next move on the part of the United States? We've seen, you know, the opposition party, the leader of the opposition party in Taiwan, going to China, talking with Xi, because Xi knows... You know, the woman that is representing the opposition in Taiwan, she knows that, you know, with what has happened with American bases in the Middle East, they're very much in a vulnerable position right now in Taiwan. But looking at what's going on in Indonesia with the Strait of Malacca, what is that? And how is that going to be perceived by the Chinese? Because that seems to me the next move of the United States against China. It's not just about Taiwan. It's about you fail in Ukraine, you fail in the Middle East because of Iran and Russia. Who said... I mean...

#John

From a U.S. point of view, from a European point of view, from a Ukrainian point of view, they don't think they're failing in Ukraine. They're failing the Ukrainian people, but they don't think that they are failing if their war aim is to weaken Russia.

#Nima

I think Europeans can feel whatever they want to feel, because that doesn't make sense to anybody. Europeans can, you know, continue this sort of hatred, but I'm talking about the United States and the agenda of the hegemon. I'm talking about the empire, how the empire sees what's going on. The empire just mentioned that the war—Donald Trump himself said that Ukraine lost the war. Donald Trump said that. I'm not making things up.

#John

Of course, he says a million things. I mean, we're not going to pick one of the things he says versus another thing he says. What is happening is he thinks Russia is increasingly vulnerable, and so do the Europeans. And I don't think we should exaggerate, as some factions of Russians do, that the Europeans are spoiling an amicable peace settlement with the United States. I can go through another list of all the things that the Trump administration does to continue to weaken Russia, and they are succeeding at that—or they think they are succeeding at that. And there is a faction around President Putin who wants to think that they can continue to make a deal, which they call the Anchorage formula.

So... I'm not ready to dismiss so quickly or so comprehensively what the US strategy is to weaken Russia in Europe. And they have ample plans to move on to adding nuclear weapons to Finland, to strengthening their position from Greenland to Canada, and on and on and on. They don't think they're weak. That's not a rhetorical position. They also think that hegemonically they are gaining in some places and shouldn't expose themselves to weakness in other places. We've called that the theory—the Elbridge Colby theory of sequencing away from weak spots to strong spots. Then we come to Asia and their view of how to fight against their principal adversary, and that's China.

Taiwan is only one of, let's call it, the fortress commitments that the United States, the Trump administration, wants to make. They certainly can claim to be advancing in Japan and in the Philippines, in Australia. As for the Malacca Strait, they continue to demonstrate the capacity of their Pacific Fleet, combined with their Indian Ocean Fleet, combined with their Mediterranean Fleet, to dominate each of these straits. I don't see that there's any weakening of US influence in Singapore. I don't see that there's a significant weakening of their belief that they can command these seas.

As for China's capacity to field a navy, China's clearly stated it's got littoral limitations. It will defend its shores. It will limit, so far as I know, its particular statement of concerns towards Japan and the Philippines. Okay? Its immediate neighborhood—Taiwan, Japan, the Philippines. They seem to be what they continue to say are their strategic priorities. And Wang said the Taiwan question bears on China's core interests as the biggest risk. Was he kidding? Isn't Wang saying U.S. involvement in Taiwan is the biggest risk that Xi won't see?

Is he kidding us, or is he exaggerating, or is he serious? I'm not prepared to say that he doesn't see things as clearly as he said. I think you're saying that China can see the weakening of the U.S. in the Middle East because essentially Iran has survived, and Iran has found a method, home-straight in its military method against Israel and the Arab states, to contest any attack on it. But I don't think the Chinese have concluded that the, let's call it, the defeat of the U.S. war aims in the Middle East translates into a weakness of U.S. war aims against China in Taiwan.

Equally, I don't think the Chinese think that the Russian position is so strong in Ukraine or in Europe as an example of how they should be strong vis-à-vis Japan and the U.S. in Taiwan. So I don't want to misunderstand you, but I don't see that China is under any misapprehension that U.S. weakness in the Middle East, U.S. weakness on the Ukrainian battlefield, translates into a weakness in Taiwan, a weakness in Japan. On the contrary, they're sequencing in the direction in which they think they're strong. Yes, of course China welcomes division of opinion in Taiwan. Why shouldn't it? It considers Taiwan to be its territory. It needs to talk to everyone in Taiwan.

#Nima

Yeah, I think the way the war in Ukraine played out for Iran, as they have this war against the United States right now, the two wars in Ukraine and in the Middle East would somehow help China in their position. And because these are all connected, I see all of them connected. I don't see any sort of isolation when it comes to these conflicts. And China, in my opinion, understands that. They know what they're doing. They know how the United States is going to be militarily—just assume militarily—what is the leverage when it comes to the military power of the United States in Taiwan. They're not going to be able to do anything against China.

#John

When was the last time China had a war? When was the last time China won a war? I can't remember. What I do recall is that when China was engaged against Vietnam, it lost. I do remember that when China was engaged in the Himalayas, it, let's say, scored a draw depending on which side you are. I do remember that Chinese support for Pakistan led Pakistan to beg the U.S. for a ceasefire and protection. I know a lot of our audience want to see Pakistan as having defeated India in last April-May's war. I think the evidence is absolutely contrary. No, no, I think what we have to realistically say is that China advertises its military power on parade. It hasn't operated any of its military capacities to show in combat it has done any better than the first two days when Pakistan fired Chinese missiles at the Indian Air Force.

The rest of the wars left out. I haven't found that the Chinese have done anything better than advertise military capacity. I'm not saying that the U.S. isn't advertising its military capacity to persuade us. Iran is showing that a small country, using years of studying its adversary, can overcome with low-cost military drone warfare, for example, the much larger, more expensive

hegemon. Iran is showing things as a small country's military capacity which haven't been seen before. We're seeing something similar in drone warfare on the Ukraine battlefield. But I don't see that if one talks military balance here, other than talking advertising, military PR, we are not talking about actual combat operational results. There are none for China.

Zero, zip. And that's fine. Let China be as peaceable as it says it wants to be. But if the U.S. side is escalating as China thinks, as Russia thinks, as the U.S. says it's doing with Japan, then we have a different strategic situation for China. And they've yet to address it with force. But, as I've said, go back to what they say they're doing. They don't need to use force. They have the capacity to control the logistics chains, the technological superiority of the entire world. I mean... I don't wish to advertise opinions with which I have profound disagreement. I'm simply saying, as evidence of how China has hegemonic ambitions and hegemonic analysis, that was in yesterday's **Dances with Bears**. I'm not here to advertise my view of it.

#Nima

I totally agree. We have this agreement, John. After all, it's not something, you know, it's a big issue. But the problem is the way that I see China today—you ask, where did China win? I would ask the same question to you: when did the United States win? It was World War II. It was Russia winning World War II and the United States celebrating what Russia won. And, you know, this is the problem right now. I think the question right now is, what is the Chinese leverage on the United States? They have some sort of partnership with Iran and Russia, who are fighting the United States on the ground and in the air. And they know how to deal with the United States. And we had Chinese officials, Chinese commanders in Russia learning.

And it was a learning process, John. The war in Ukraine, it was a huge learning process for China. The war against Iran in the Middle East is a huge learning process for China, in my opinion. And let's put out the other point, John, when it comes to China. Where does China have leverage on the United States? When it comes to the rare earth minerals, the United States needs those minerals to rebuild its arsenal, its stockpile. They have to replace these cruise missiles, interceptors that they've used in the war against Iran and against Russia. Who's going to give those minerals to the United States? They're mostly dependent on China right now. I think China has each and every card right now against the United States to play with the Trump administration.

#John

Look, I think that your statement of the evidence we can agree on. Your conclusion is beyond my capacity to analyze Chinese politics from where I sit, which is a Moscow seat. But when I see U.S. colleagues who are expert on China, or European colleagues who are expert on China, or Asian colleagues who are expert on China, or Indian colleagues who are expert on China—when I look at the way they analyze the evidence, yes, China has cards. But their conclusion, and I think it's a consensus, is that China will make a kind of hegemonic partnership with the United States. It

accepts it needs the United States. It accepts that it can teach the United States that, as the hegemon, the United States needs China, that they want common goals for their domestic economies.

That's what I think is about to be demonstrated in a Trumpian way when he gets to Beijing on May 14, 15. A hegemon partnership suits both sides. It doesn't necessarily work to the advantage of Iran, and it doesn't necessarily work to the advantage of Cuba, and it doesn't necessarily work to the advantage of Russia. Let's basically concede that China has written off its investment in Venezuela and not defended it or sought reparations. As for China's reach into Africa, that's the one area in which I know quite a lot about the way China behaves in Africa. And I won't get into that story, but it doesn't reflect the behavior of a hegemon or even a particularly persuasive great power with respect to the African states.

But let's leave that aside. Let's take the points you mentioned. And let's face the next two weeks in which Iran is facing new risks and in which China has not said a word to deter the United States from exercising maximum force against Iran—not at all, not one word. Instead, China has, in the words we've spelled out from Wang Yi, invited the U.S. to be cooperative on the same basis as the Anchorage formula formed with President Putin. Since the Anchorage formula went nowhere, we've gone through that because it's not U.S. policy. Underneath all that, Trump says he wants to see a defeat of the U.S.-European NATO side at Russian hands.

So I think we'll see to what extent Wang Yi's promise of cooperation, mutual respect, stable relations—this misrepresentation of all the facts for the one representation of the partnership of the two hegemonies at the expense of everybody else—that's what I think we're seeing now. And we'll see it in the next... we'll see whether Mr. Arakchi comes back from China with quite the level of reassurance that he left Moscow with. We'll see also one week later whether President Trump and President Xi develop quite the bear hug—sorry, bears a Russian—quite the hug that each side has promised each other. And we'll see if Iran and Russia suffer at their expense.

#Nima

Yeah. I think China has said that they don't care about the American people's sanctions when it comes to the refineries in China. It's something practical. At least they talk about it. In the last two days, we've learned that... No, wait a minute. They do care.

#John

They simply say, "We are going to disregard them."

#Nima

But they do. Basically, it means that you're not going to force us into a position.

#John

But China is forced. The major Chinese banks do comply with U.S. secondary sanctions. What you've seen, and it's quite right, is resistance on the tiny end, the so-called teapot oil trade. This is less than, I don't know, roughly between 5% and 10% of Russia's oil trade. They're saying, "We reject these sanctions." Remember the last time Xi and Trump met in South Korea, China sought and got an exemption to buy oil from the Russian trade—sea oil, not simply pipeline oil, as it receives. So China does care. China also says, "We don't respect these bilateral sanctions." Russia says the same thing. But this talk doesn't amount to defending convoys.

Russia needs convoys. Russia needs to defend its convoys from Ukrainian-British-American attack. Those attacks extend all the way to the coast between Crete and Libya. Russia has to defend its convoys now. China does not have to defend its convoys yet. You've raised the Malacca Strait. We've discussed at length the Hormuz Strait. For the time being, China is not equipped to defend militarily its convoys. Russia says it's planning to defend its tanker trade. I don't think we should minimize the amount of damage China has accepted from secondary sanctions. It's in their banking system. It's in their major state oil companies.

The minor Chinese players, the minor Chinese businessmen who—and I don't know what political influence they have with President Xi, either regionally or centrally—are being defended by words. We'll see whether they get the oil despite U.S. intervention. But we can readily see that the U.S. might sacrifice some of its sanctions enforcement for the teapot oil trade, the minor refinery oil trade, the discount oil price trade that China performs. We'll see if the U.S. extends or tightens or loosens sanctions against the big Chinese enterprises. That remains to be seen. I'm beyond my competence in saying what China will actually do to defend its interests. It says it will only defend its interests with force on its coastline in the Taiwan Strait.

#Nima

Now, let's see what would happen. I see China being more strategic, more pragmatic. And because I've seen that in Ukraine, I would say the same is going to happen in the case of Iran. And they understand the United States is not a friend. They could have some sort of mutual understanding, but the United States' main target is China, in my opinion. And China understands that, and they will do everything to diminish the United States' means to attack them or to harm them. Let's see what would happen with this.

#John

I agree entirely with your summary. We don't disagree at all on that.

#Nima

Yeah. Let's see what these little policies are in play right now. And I think time brings that to us.
Yeah. Thank you. Thank you, John. Great pleasure as always.

#John

As always. Thank you, Nima. See you next week when we'll see a bit more.

#Nima

Exactly. Exactly. Exactly. What we're going to talk about.