

Andrei Martyanov: Iran vs Israel: The War Nobody's Ready For

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#Nima

The meeting between Xi Jinping and Donald Trump, and what we've seen so far, it was all about how China can buy agricultural products from the United States. It's soybeans, basically, where the United States was replaced by other countries like Brazil, for example, in the case of soybeans. And I think one of the most important things was this Strait of Hormuz. Donald Trump wanted China to do something about it. But they didn't say, they didn't mention anything about the toll system, the new mechanism of the Strait of Hormuz. They said it must be open — demilitarization of the Strait, which is basically the United States militarizing the Strait.

#Andrei

Yeah.

#Nima

And how did you find it, Andrei? Because we see, I would say, the way China is today is so much influenced by the two wars — one in Ukraine and one in the Middle East — and it put China in a different place to meet Donald Trump in Beijing. What's your understanding of what has happened?

#Andrei

My understanding is based also on this fact, which is, it's not a rumor. But there is a very interesting, so to speak, shuttle, you know, or solitaire, if you wish, in the sense that China actually was pressing Iran to conclude any kind of agreement with the United States in order to open the Strait of Hormuz, because up to 25% of the energy comes through China. China is in a precarious position here because obviously, for all this, you know, bravado, the reality is China needs energy — a lot of it. Obviously, one of them is Russia — its gas and oil and all that — but still, what do you want to do? How can you replace one-fifth, essentially, of your energy consumption? And all this talk about China's coal — I spoke about this with Garland Nixon yesterday — and I mentioned that China has very good quality coal. The problem is, it's over in terms of easy extraction.

You need to go deeper and deeper, and some of the mines are more than one kilometer deep or something like that. This is a horrendous depth. It's very expensive. And renewables, obviously, as I already stated yesterday — anybody who comes in, “Oh yeah, China leads the way with renewables.” Well, did anybody see the share of the actual renewables? Hydroelectric is considered renewable, but obviously, a gigantic portion of those renewables, the overwhelming majority, is hydroelectric. All the solar, wind, and what have you — it's all for the consumption of the public, which doesn't understand the basic physics. So China is in a precarious position here.

And if it's true, which I tend to believe it is, that China was pressuring Iran regarding some kind of settlement between the United States and Iran — obviously, we know it's Israel and the Gulf too — that's not very interesting. Let's put it this way: this is a very good indication of the actual position of China in the sense that, obviously, they have to follow their own national interests, and it's perfectly normal that they want to settle things down. But you do not go out and try to preach there, you know, all this gospel of, you know, the best man, you know, like a hippie. No, that's not how it works. And that is why you begin to see now a very interesting shift in Iranian rhetoric, which is becoming increasingly pro-Russian.

If you, I believe the recent statement by Arakcheev, who said that Russia is a guarantor essentially for the things of Iran, seldom says anything like this, you know. So, and then you begin to see the tremendous activity, the activation of the Caspian Sea route between Russia, which existed before, obviously. But now it's evidently got, you know, a serious boost. So it's very complex dynamics. And again, make no mistake, I understand that for China, the most important question apart from energy is Taiwan. And guess what? Marco Rubio, and yeah, there is no... This is the funny thing. The United States officially recognizes China's sovereignty over Taiwan.

But it is one thing to officially do something, and totally unofficially, this is what the West does in the special military operation — support effectively their, essentially, well, irredentist movement, if you wish, you know, of the Taiwanese, and supporting all kinds of parties which are now opposing, you know, which was the originator essentially of Taiwan's sort of independence. So nothing has been resolved here. And Marco Rubio made it very clear today. You know, he went on the record, and you can listen to him today, and he evidently said, OK, we know their position. They know ours. That's it.

No. And that is the issue. So no matter how many perks you will try to offer in terms of the economics, which is important, of course. Nobody says that it is not. But the reality is their overriding national interest, national pride, national whatever. And especially the cultural unity. What is Taiwan? Chinese people, that's who they are. I mean, they're Chinese, all right? So it's a very, very peculiar situation. And it's a three-body, if not five-body problem, let's put it this way. And nobody can basically predict right now. I mean, generally, you can kind of sort of get the general direction, but China is also facing some challenges, and especially considering the fact that part of the Chinese party elite, and especially the southern elites from the southern provinces of China, are very pro-Western and very liberal.

They want to follow essentially in the wake of the United States. They admire the combined West, despite the obvious indications to the contrary of what is happening. And so Xi has on his hands a very complex situation. There were obviously purges and all kinds of things which were cleaning up, cleaning the house, you know, essentially. But how much it's going to be in continuation once he leaves his post, you know, he's obviously a very powerful man, no doubt about it. You know, it's difficult to say. No matter how much corruption they clean, no matter how many of those people, some of them are downright prisoners, people they take out, you know, still, it's a gigantic country and it is very non-cohesive.

Essentially, you know, there are all kinds of things I did. I'm not a psychologist. I am a specialist. I don't read Chinese, so I cannot pass judgment here on my own, but what I heard from real sinologists, people who live there or who lived there for many years—they speak Chinese, they speak Cantonese, whatever the hell, you know, those dialects—and they say it's a very non-cohesive society, all kinds of ethnicities and things of this nature, and obviously it's very difficult to keep this country together as what Xi does and the CCP, the Chinese Communist Party, does. How long this course will continue, obviously, there are some benefits to it for people.

But again, as you know, especially in countries like this, the situation is not always what it looks like, you know. So, we have Mr. Putin flying to Beijing very soon, and that will be sort of touching base on what is happening, because Iran now occupies an equally important—not equally, but I mean, very important, very close second place—for Russia, because evidently something is happening in terms of their relations. And you have to understand, just to give you an example of what is happening, the Chinese MANPADS have been spotted and have been taken from Ukrainian forces. China continues to supply the forces of Ukraine with MANPADS and all kinds of things of this nature. This is like, okay, you know, so yeah, there are questions there, okay? There are issues.

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He said, Donald Trump said that China, Xi told him that they're not going to send weapons to Iran. But after all, they don't need Chinese weapons because Iran is just fighting its own war.

#Andrei

Yeah. And there are certain systems that have been delivered from China. We know that. So whatever was delivered—and again, we don't know what was delivered—we know what Russia delivered. That is, you know, pretty much obvious because even the Iranians don't, you know, don't hide it. You have these, you know, evidently updated, upgraded MiG-29s, which are now upgraded to the much, you know, almost MiG-29 SMTs. They have this new Zhuk Beetle radar, they have the capability to engage targets at a very long range, you have Mi-28s flying there, you have Su-35s, so you can see it, you know it's there, you know that the things... With China, you know that they have been flying aircraft with something, but evidently whatever was negotiated between China and Iran there, they want to keep it under wraps.

And the reason they want to keep this under wraps is because China still considers the United States not just competitive, but it is. And I don't want to be misinterpreted here, but I will use this term: China still is afraid of the United States militarily. And I know—actually, I'm not a sinologist—but I know quite a bit about the Chinese armed forces. So there are things that China needs to consider in this particular case. Despite some successes, they definitely move ahead with many things, you know, and some achievements there, no doubt about it. But China is very much aware that, let's put it this way, it's not as strong as it tries to portray itself militarily vis-à-vis the United States.

#Nima

But if that's the case, they need allies, they need partners who are...

#Andrei

Russia is, yeah, it's obvious. And then, do not forget—you know this probably—I was stunned when a few years back, very few, three, maybe two and a half years back, when this started to circulate, not obviously in the mainstream media—I don't even read them anymore—but actually in media from different countries, which are more or less objective. And this famous investment agreement between China and Iran, which was assessed at \$400 billion, which is very significant, very large. And there was actually resistance from the Iranians. And the reason there was resistance was because, obviously, China said, we will come in with this money.

And China is a rich country that has a lot of money. But essentially, that's what was happening—they wanted to remove, actually, whatever project they were doing there, to shrink as much as possible the Iranian participation. That was all about making money and making profit for China, not so much about Iran. Of course, Iran would benefit and what have you. And I understand, and I was reading this, including the Russian press—and serious Russian press, not some media—I'm talking about analytical materials from Russia, analytical sources I respect, and I know they're the real deal, that they were saying Iranians were actually kind of pushing back because they said, you know what, oh, it's fine, but what about us?

What is our participation? And then it was like, no, no, no, no, we will do it on our own, and we will own it essentially. This is what this is all about. So in this case, that is why, if you listen attentively and you follow the press and the news and what have you, then this Belt, you know, this road, this new Silk Road of China, is kind of—it's still there, but not quite. Just to give you an example, the final terminals for this new Silk Road were obviously Europe, which at that time was projected to be what? Solvent and high, you know, a society of the first world, with the expenditure that would support this type of excessive manufacturing capability of China.

Well, guess what? Europe is becoming poor. Simple as that. I mean, this is just unbelievable. And so China is easily left here with this serious problem because, of course, they need to shift now to Eurasia, which is developing, and the Eurasian continent is going to be more prosperous than Europe

within some decades. But that was one of the things which was foundational for the Chinese economic expansion. And so there you go. And this dynamic, you will not find anything about it—well, except for them trashing China. They love to trash China. I don't. But I have to state here that there are problems. There are issues. And Vladimir Putin obviously flies to Beijing.

Not only that, because obviously we know that Trump wanted China to facilitate some kind of agreement between the United States and Israel, all right, and the Iranians. The Iranians already stated it's a no-go. And that was a snap to China because China wanted to insert themselves as the broker. No way. And the Iranians have been very clear on that. And what can I say? It's a 525-body problem. Okay, you have to juggle this whole thing. What is going to happen? What's going to happen? And that's the situation. And obviously, the situation with Taiwan, and essentially failure with Iran.

Iran obviously is not going to compromise on its control of the Strait of Hormuz. And I believe it was Araghchi—no, it wasn't Araghchi. It was one of the generals from basically the Revolutionary Guards. He said, we're going to make on Hormuz trade more than we make on selling oil. There you go. And this money stays within Iran. You know, so there you go. And here's the thing: Russians don't care about sanctions. Russians broke through. They don't care. They say, oh yeah, you cannot do—oh yes, we can. China still plays with the sanctions.

#Nima

Actually, China paid, Andrei. They were talking about the toll system in the Strait of Hormuz. From Iranian sources, we've learned that there were multiple Chinese ships passing through the Strait of Hormuz before the meeting between Donald Trump and Xi. They paid the fee, but they called it environmental and logistical upkeep costs. They put a name on it.

#Andrei

Iranians know. Iran definitely does know the spread. Iran does know the score. Iran is in the middle. It's a pivotal country there. And that is why, yeah, we have to keep in mind, or have an eye on the whole spread, so to speak, this larger picture. And it's not that black and white at all. There are so many shades of gray. There are all different colors there. And again, do not forget. That's what people do not understand. What happened with North Korea? Russia said, screw your sanctions, and they just broke through, period. They said, we don't care, you know. Same is happening now with Iran. We don't care.

You can impose sanctions. Russia has, what, 26,000 sanctions on it now? So Russians don't care, you know. So Iran is the neighbor. Iran is the ally. Let's do it. Don't even look at it. Iran, what do you want in terms of weapons? Okay, there you go. Inked. That's it. Doesn't matter what the Combined West says anymore. China still continues to abide by, largely, not all, but many things which are related to sanctions. And that is why there was a negotiation where China said, we want

to, we will continue to buy oil from there. But again, it's not negotiable. With Russia, you just cannot come and say, we don't care, go screw yourself.

No, China wants to settle it. What they do not understand is that the moment you begin to discuss this issue, as if looking for approval, you immediately exhibit your weakness. Just do it. Don't ask. You are big enough, you are powerful enough to tell the United States to go pound sand. But China very much is dependent on the West. And again, I want to stress, especially this guy, whatever this good Lord, this idiot from the European Council on Foreign Relations, he organized it in 2007 on George Soros' money. You know what happened. China was denied Pratt & Whitney jet engines for its...

#Nima

You're talking about Josep Borrell? No, no, no, no, no, no.

#Andrei

Lazarus or whatever the name of the man, something like that. No, no, the guy who actually organized the council. He is a big country guy and he is a globalist and, you know, whatever. And he, two days ago, published a piece, and it was covered by all major European media. He said, we need to also ground all commercial, more than 500 Airbus aircraft, which China flies. So you have to understand what is going on. China doesn't have modern jet engines for commercial aircraft. That is why they went to Russia to ask for PD-14. But this is the thing people do not want to see. They don't want to discuss it. But what happened? Trump stopped their delivery of the Pratt & Whitney jet engines. And guess what?

The new project, which is not really Chinese, it's essentially a Western aircraft, which is the Comac 919. Guess what? It's totally grounded. It's not moving anywhere. They cannot remotor it with the Chinese engines, which are much inferior. And so suddenly this whole project went out of the window. So now you have these guys, and he is—you will find it, the name of him—and you can find this article in The Guardian. It was all over the place in the European press. And he wrote that we have to behave like the Chinese, Europe. That we have to ground all those 500 Airbus planes which China flies. That's a catastrophe, actually. They did it to Russia, but Russia has its own, so Russians did fine. China cannot do that.

#Nima

I think China has seen what has happened with the case of Russia and Iran. Both countries wanted to negotiate with the United States, but it doesn't matter how big or little the issue is, they're not going to give up on their objectives. When you see Taiwan, I think Taiwan is so important for the

United States right now because they, as you mentioned, have an official sort of policy. Unofficially, they just want to send more than \$11 billion of weapons. They're talking about sending them to, yep, Taiwan.

#Andrei

What is that? Well, this is the thing which the United States thinks it is free to do. And you have to understand, that's the whole thing. Obviously, the United States needs China, no doubt about it. And essentially, the United States and China are still kind of joined at the hip to a degree, despite the fact that China dramatically reduced its holdings in terms of treasuries, and it's dropping them. Obviously, Trump went to China because he wants China to finance the United States, you know, basically by buying the treasuries, you know, which are worthless papers nowadays, you know. And also, yeah, the agriculture, soybeans, as you correctly stated, the United States was the major provider of soybeans.

And so there is a mutual interest. And so, what can I say? The United States thinks that it can offer some kind of privileges and trade them in for those privileges, of course, absolutely worthless. Russians understood it from the get-go. They told the United States to go pound sand. But China will negotiate. They will negotiate in the sense that, you know, let's kind of find something, you know, how can we both benefit from this? But the United States doesn't care, because it is the state of mind in the United States that we are so great, we are so amazing and shining, that even though we are becoming poor, we still think that we are so admired around the world, which is absolutely not the case anymore.

But in China, as I already stated, there is a very strong, very powerful pro-Western and liberal, so to speak, strata. And it's not just party bureaucrats or military bureaucrats or intelligence bureaucrats, what have you. It is also a very large strata of the population who still, you know, listen—China actually is so enamored with Europe that they actually built a mini Paris. You probably don't know it, but there is literally a city that looks like Paris, with an Eiffel Tower and things of this nature. This is how it happens. So there is still this, you know, pretty peculiar Chinese attitude towards the combined West.

And again, this partially was spurred by the fact that they saw Europe as the main consumer of Chinese goods. And this is essentially what is happening. China is dumping, so to speak, on Europe many things. And let's put it this way—very mediocre, to put it, automobiles—but they are cheaper, you know, so they want also to get, which is happening also, Germans are moving a lot of production to China, you know, in terms of its automobile industry and things of this nature. So it's a complex, again, it's a complex interaction. It's not like one or two things—there are a lot of gears, so to speak, which basically turn there.

And, um, again, as I already stated, we need to wait for tomorrow's communique between... I think they should come up with the final statement, you know, upon the completion of the visit. It's a

state visit, so they have to come up and make the press together. They have to, you know... But the Chinese will always be pretty much the same, like, you know, general terms, platitudes to cover things. And I don't think Trump is capable of patching up anything, including with China. But again, as I already stated, the Chinese, as you correctly stated, they saw what the United States does in terms of the sanctions. And unlike the case with Russia or Iran, China is kind of on the edge with all that.