THE AGGRESSION AGAINST IRAN

Chinese and Asian Strategy and Tactics in the Face of Broken U.S. Deterrence and Decomposing Hegemony

Andre ZAAIMAN

05 May 2026

ABSTRACT

A ceasefire has been in force in the United States–Israeli aggression against Iran — Operation Epic Fury, launched on 28 February 2026 (United States Department of War, 2026, para. 1) — since 8 April 2026. Yet, in the past few weeks, Washington has surged its forces in Southwest Asia on top of an already substantial deployment. The headline concentration is a three-carrier posture anchored by the arrival of the USS George H.W. Bush on 23–24 April with more than 5,000 elite troops; over 10,000 United States personnel in theatre; the Strait of Hormuz ringed by guided-missile destroyers and P-8 Poseidon aircraft; F-22s in Israel; F-15Es in Jordan; and F-35Bs diverted from NATO's Cold Response 2026 exercise. To this is added United States Central Command's formal Request for Forces of 29 April 2026 for the first-ever operational deployment of the Army's Dark Eagle Long-Range Hypersonic Weapon (Bloomberg, 2026, para. 1) — a request necessitated by the exhaustion of Precision Strike Missile stockpiles in thirty-eight days of war (DefenseScoop, 2026, paras. 5–6) — and a fresh wave of more than forty KC-46 and KC-135 aerial-refuelling tankers moved into theatre over forty-eight hours (Aerospace Global News, 2026, paras. 1–3).

Crucially, however, this posture is not a static fact. In the course of the war Iran has, through sustained ballistic and cruise-missile salvoes, destroyed or rendered operationally inoperable the principal United States land bases on which Washington had for two decades depended in the Gulf and the wider region — Al Udeid in Qatar, Al Dhafra in the United Arab Emirates, Ain al-Asad in Iraq, and Prince Sultan in Saudi Arabia have all sustained damage sufficient to degrade their utility as platforms for the prosecution of a sustained air campaign, a pattern of destruction subsequently confirmed by The New York

Times (New York Times, 2026, paras. 2–7). The visible consequence is that the United States has been forced to lean disproportionately on carrier strike groups operating from international waters and on the British–American base at Diego Garcia in the Chagos Archipelago, more than three thousand kilometres from the theatre of operations (New York Times, 2026, paras. 9–11). The very massiveness of the surge is therefore in part a substitute for a regional land-basing architecture that no longer exists in functional form. The empirical footprint that opened the war and the empirical footprint that sustains the surge are two materially different things.

How is this surge to be read? The most rational explanation is that the TRUMP administration is staging a Shock-and-Awe culminating strike — or holding open the credible threat of one — to be declared a victory in domestic media and used as the political cover for withdrawal. Yet the Shock-and-Awe interpretation is itself only the surface phenomenon; the deeper explanation is that the surge is the empirical signature of a hegemon attempting to repurchase credibility with firepower because no other instrument remains available to it. It is the visible artefact of broken deterrence and decomposing hegemony.

This paper advances a connected three-part argument. First, it contends that the joint United States–Israeli aggression has accelerated, rather than arrested, the decomposition of American primacy, preponderance and hegemony, and that the patient Chinese strategy of small, distributed and procedurally innocuous moves has materially intensified that trend. Second, it contends that the surge — most plausibly the kinetic component of an exit strategy — reveals a deeper structural truth: Iran, China and the wider Asian space have cracked the foundations of American military deterrence, compelling Washington to escalate in the attempt to repair it. Third, and most importantly, it contends that modern warfare and modern deterrence are no longer captured by the older grammar of battlefield supremacy or narrative dominance alone. They are now exercised across a compound battlespace in which the economic and financial dimensions are constitutive rather than auxiliary; and within that wider battlespace China and East Asia have, quietly and methodically, broken American economic and financial deterrence as decisively as Iran has tested its kinetic counterpart. The subtlety, sophistication and effectiveness of this Chinese strategy has been systematically overlooked by Western analysts. The paper accordingly seeks to read the surge against the grain of its own kinetic *spectacle, interpreting it as the symptom of a Chinese and Asian strategy that has progressively dismantled the tariff, currency and sanctions leverage on which the economic and financial dimension of compound battlespace deterrence depended.*

The complementary question is what China and the Asian powers are doing in response. Western analysts insist they are doing too little. This paper argues those analysts are missing the strategy because they cannot read the game. Where Western strategic socialisation runs through chess, Asian strategic thought runs through weiqi (the game known in Japanese as Go). The paper traces five empirical "stones" placed by China and its partners and shows how the apparent shift from Active Defence to Offensive Defence is the operational signature of an encirclement that the chess-trained American policy community is structurally unable to see. John MEARSHEIMER's judgement that this is the "greatest foreign policy blunder in US history" (MEARSHEIMER, in What Really Happened, 2026, para. 1) is treated here as the operative diagnosis.

1. INTRODUCTION: THE BUILD-UP AND THE GAME BEHIND IT

By May 2026, and during the ostensible ceasefire that came into force on 8 April after the failed Islamabad talks, the United States is mounting in Southwest Asia its most concentrated theatre force since the 2003 invasion of Iraq. On 23–24 April 2026, in the third week of the ceasefire, the USS George H.W. Bush carrier strike group arrived in CENTCOM's area of responsibility carrying more than 5,000 elite troops and capable of supporting over 80 aircraft, joining the USS Abraham Lincoln in the Arabian Sea and the USS Gerald R. Ford in the Eastern Mediterranean (Radio Free Europe/Radio Liberty, 2026, paras. 1–3; Al Jazeera, 2026c, para. 5). This is the first three-carrier deployment in the region in decades. More than 10,000 United States troops are now estimated to be in theatre (Al Jazeera, 2026c, para. 5), with thousands of additional Marines, paratroopers and sailors expected by month-end (Radio Free Europe/Radio Liberty, 2026, para. 4).

The Strait of Hormuz, southern Arabian Gulf and Gulf of Oman remain ringed by guided-missile destroyers, P-8 Poseidon maritime patrol aircraft, F-22s at Ovda, F-15Es at Muwaffaq Salti, and an F-35B squadron earlier diverted from NATO's Cold Response 2026 exercise (Middle East Forum, 2026, paras. 5–6). On 19 April, TRUMP threatened that the United States would "knock out every single power plant, and every single bridge, in Iran" if no agreement were reached (TRUMP, in House of Commons Library, 2026, para. 2). On 4 May, with the ceasefire visibly fraying, United States forces fired on Iranian fast-attack vessels in the Strait, and TRUMP warned that Iranian forces would be "blown off the face of the Earth" if they targeted American ships (TRUMP, in CNN, 2026b, paras. 1–3).

On top of this already substantial deployment, the past few weeks have produced a distinct surge. On 29 April 2026, in the third week of the ceasefire, United States Central Command formally submitted a Request for Forces to the Pentagon for the first-ever operational deployment of the United States Army's Dark Eagle Long-Range Hypersonic Weapon (Bloomberg, 2026, para. 1; Newsweek, 2026d, paras. 2–3). The request was made because Iran, exploiting the ceasefire, repositioned its ballistic-missile launchers beyond the three-hundred-mile reach of the United States Army's Precision Strike Missile (PrSM) — and because the United States, in the first combat use of the PrSM in the system's history during Operation Epic Fury, exhausted its PrSM stockpiles in thirty-eight days of war (DefenseScoop, 2026, paras. 5–6). The Dark Eagle exists in numbers Defense Express describes as “possibly fewer than a dozen”, with production fixed at twelve missiles per year and each round costing between fifteen and forty-one million dollars (Defense Express, 2026, paras. 4–6; Newsweek, 2026d, para. 6).

In parallel, more than forty KC-46 and KC-135 aerial-refuelling tankers crossed the Atlantic in forty-eight hours, accompanying four dozen F-16s, three squadrons of F-35As and twelve F-22 Raptors — over one hundred and twenty United States military aircraft moving into the theatre in the space of two days (Aerospace Global News, 2026, paras. 1–3). The top nine most-tracked aircraft on Flightradar24 on 18 February 2026 were all confirmed United States Air Force KC-135 Stratotankers (Flightradar24, in Aerospace Global News, 2026, para. 5); the total number of refuelling tankers at Ben Gurion Airport had risen to fourteen by 27 February (Times of Israel, 2026, paras. 1–3). Tankers are the leading indicator that defence analysts track because no major air campaign happens without them.

These figures, however, must not be read as a static photograph of American posture. The deployment that opened Operation Epic Fury and the deployment that sustains the present surge are materially different in kind. In the course of the war Iran has, through sustained ballistic and cruise-missile salvoes, struck the principal United States land bases on which Washington had for two decades depended in the Gulf and the wider region. The New York Times has confirmed that Al Udeid Air Base in Qatar — the forward headquarters of United States Air Forces Central Command and the operational hub of regional air operations — sustained damage sufficient to degrade its capacity to host sustained tanker, command-and-control and fighter operations, and that Al Dhafra in the United Arab Emirates, Ain al-Asad in Iraq, and Prince Sultan in Saudi Arabia were all hit, with imagery and host-nation reporting documenting destroyed hangars, cratered runways and damaged accommodation (New York Times, 2026, paras. 2–7). The cumulative effect is that the regional land-basing architecture the United States constructed over four decades has been operationally degraded to a point at which it can no longer support a sustained air campaign on its own.

The visible consequence of that degradation is the geometry of the present surge itself. The United States is now compelled to lean disproportionately on carrier strike groups operating from international waters — three of which are now in theatre simultaneously for the first time in decades — and on the British–American base at Diego Garcia in the Chagos Archipelago, more than three thousand kilometres from the operational area, with B-2 Spirit and B-52 bomber rotations and KC-135 tanker reinforcement now confirmed at the atoll (New York Times, 2026, paras. 9–11). Carrier-based and Diego Garcia-based aviation are far more expensive per sortie, far more constrained in tempo, and far more dependent on aerial refuelling than the regional land-based force they replace. The very massiveness of the surge is therefore in part a substitute for a basing architecture that no longer exists in functional form. What looks, from the satellite-imagery panopticon of open-source intelligence, like a hegemon at the height of its powers is, on closer examination, a hegemon that has lost the regional infrastructure on which its previous deterrent posture rested and is now reaching, from the sea and from a remote atoll, for an effect it can no longer generate on land.

That a build-up of this scale, with three carrier groups and a continuing wave of reinforcements, is being assembled during a ceasefire, rather than dismantled at its onset, is itself the most legible signal of strategic intent. As TRUMP himself has stated, the United States has used the cessation of hostilities to "restock" and is "ready to go" if peace efforts fail (TRUMP, in Radio Free Europe/Radio Liberty, 2026, para. 2).

The most plausible interpretation is that the TRUMP administration is using the ceasefire as the staging period for what military planners call a Shock-and-Awe culminating strike — a paroxysmal escalation designed to be declared a victory in domestic media and used as the political cover for withdrawal. The deeper strategic purpose, beyond any immediate kinetic objective, is the attempt to re-establish escalation dominance, to repair broken deterrence, and to arrest the decomposition of American hegemony by a single performative act of overwhelming force. Whether or not the strike comes, the build-up itself is the message: a hegemon attempting to repurchase credibility with firepower because it has no other instrument left.

The companion question is what China and the wider Asian and Eurasian space are doing in response. The dominant Western answer is that they are doing too little — that Beijing has been passive, that the Gulf Cooperation Council has hedged ineffectually, that ASEAN has failed to coordinate. This paper argues the opposite. Western analysts are missing the strategy because they cannot read the game being played. Where Western strategic socialisation runs through chess, Asian strategic thought runs through weiqi (Go), and the two games train fundamentally different cognitive habits. The paper deploys weiqi not as a decorative metaphor but as a properly explanatory framework, drawing on the recovery of the game in Sinological scholarship as a vocabulary capable of describing patient, distributed, encirclement-driven strategy in a way that the chess vocabulary of confrontation and decisive battle structurally cannot. KISSINGER (2011, p. 23) drew the contrast precisely:

> *"Where the Western tradition prized the decisive clash of forces emphasising feats of heroism, the Chinese ideal stressed subtlety, indirection, and the patient accumulation of relative advantage" (KISSINGER, 2011, p. 23).*

This paper's purpose is not to re-analyse the structural sources of American decline — those have been treated elsewhere — but to identify the specific strategy and tactics by which China and Asia are using the present conjuncture to shift the balance of power further and faster.

John MEARSHEIMER (2026a, para. 14) of the University of Chicago has summarised the position with characteristic bluntness: "Trump committed a colossal blunder"; the war, he insists, has been "a colossal blunder" in which "the other side has all the cards" (MEARSHEIMER, in HPHerald, 2026, para. 6). His more recent assessment of 30 April 2026, after the failure of TRUMP's blockade and the collapse of the Islamabad talks, sharpened the diagnosis still further:

> *"Trump was foolish enough to start this disastrous war… There is no way that he wins this war" (MEARSHEIMER, 2026b, paras. 1–2).*

Speaking on Deep Dive with Lieutenant-Colonel (retired) Danny DAVIS, MEARSHEIMER described the Iran war as surpassing the 2003 Iraq War in scale of strategic damage, calling it the "greatest foreign policy blunder in US history" (MEARSHEIMER, in What Really Happened, 2026, para. 1) — a war whose consequences have already wrecked the Gulf security architecture the United States spent decades constructing.

2. WEIQI, SHI AND READING THE CONJUNCTURE

To understand Chinese strategy and the wider Asian strategic logic mobilised in the present conjuncture, one must first acquire a basic grasp of weiqi, the board game that has shaped Chinese strategic imagination for more than two and a half millennia. Weiqi — the term translates literally as "the encirclement game" — originated in China not later than the first millennium BCE, was transmitted to Korea as baduk and to Japan as Go, and has remained, alongside calligraphy, music and painting, one of the four classical arts of the educated Chinese person (FAIRBAIRN and HALL, 2007, pp. 8–14). The game is played by two players who take turns placing black and white stones on the intersections of a nineteen-by-nineteen line board; the goal is not to checkmate a single king but to surround and control more territory than the opponent. Its computational complexity — vastly greater than that of chess — is also why it became, in the twenty-first century, the canonical benchmark for testing artificial intelligence, culminating in DeepMind's AlphaGo defeating world champion Lee Sedol in 2016 (SILVER et al., 2016, pp. 484–489).

The cognitive habits the game cultivates differ structurally from those of chess. In weiqi the "stones" of the title are simple and undifferentiated; their power is generated entirely by their position relative to other stones. There is no decisive central piece whose loss ends the game. Multiple local engagements unfold simultaneously across the board. Stones placed in apparently empty regions only reveal their function when the configuration is complete and the opponent discovers, often too late, that an encirclement has been formed. The classical Chinese strategists encoded this logic explicitly: SUN TZU (c. 500 BCE/2003, p. 17) observed that "the supreme art of war is to subdue the enemy without fighting"; the Indian counterpart tradition, KAUTILYA's Arthashastra (c. 4th century BCE/1992, Book VII), developed an analogous theory of the rajamandala — the circle of states — in which strategic advantage is produced through the patient configuration of allies, neutrals and adversaries rather than the direct application of force. Across both classical canons the strategic imagination runs through positional accumulation, not through the chess-style search for the decisive battle.

The central operational concept in David LAI's monograph is shi, variously translated as "the alignment of forces, the propensity of things, the potential born of disposition" (LAI, 2004, p. 6). Shi is not power in the Clausewitzian sense of mass to be hurled at a centre of gravity. It is the positional advantage that emerges when stones are placed such that the configuration of the board itself becomes the weapon. As LAI (2004, p. 7) argues, shi permits “a skilled strategist… to ensure victory over a superior force”. KISSINGER (2011, p. 30) summarises the weiqi analogue: the player “moves into ‘empty’ spaces on the board, gradually mitigating the strategic potential of his opponent’s pieces”.

The technical vocabulary of weiqi is itself analytically useful. A joseki is a locally balanced exchange. A shoulder hit is a reduction technique: a stone placed on the diagonal of an opponent’s framework, light and sacrificeable, designed to deflate territory rather than capture it. Sente is the move that compels the opponent to respond, holding the initiative. Sabaki is light, flexible play that escapes pressure without committing to a fixed shape. Aji is the latent potential of a stone that has not yet been activated — an unspent threat sitting on the board (FAIRBAIRN and HALL, 2007, pp. 47–63).

The physics and mathematics of non-linear systems anchor this strategic logic more rigorously than the loose appeal to systems-thinking common in international-relations theory. LORENZ (1963, p. 130), in Deterministic Nonperiodic Flow, demonstrated that “nonperiodic solutions are ordinarily unstable with respect to small modifications, so that slightly differing initial states can evolve into considerably different states”. BAK, TANG and WIESENFELD (1987, p. 381), working in statistical physics, showed that systems driven slowly toward a critical state organise themselves so that arbitrarily small perturbations can trigger avalanches of any magnitude — the canonical mechanism of self-organised criticality. SCHELLING (1971, pp. 143–186) demonstrated mathematically that mild individual preferences in social systems can produce sharp tipping behaviour. JERVIS (1997, p. 17) reminds the international-relations discipline that in tightly coupled systems “the total effect of behavior is not equal to the sum of individual actions”.

The structural predicament of declining hegemons reinforces this analytical frame. GILPIN (1981, pp. 186–197) demonstrated that uneven economic growth shifts the underlying balance of power and progressively weakens the foundations of an existing international order; KENNEDY (1987, pp. 514–540) traced the recurrent pattern of imperial overstretch in which the gap between economic capacity and military commitments produces long-run great-power decline; ARRIGHI (1994, pp. 27–58) showed historically that hegemonic cycles culminate in financial expansion that signals, rather than averts, transition. ORGANSKI and KUGLER (1980, pp. 19–23) and POWELL (2006, pp. 169–203) provided the formal core of power-transition theory, showing that differential growth and shifting power produce commitment problems that can render bargained settlements impossible. The 2026 conjuncture — an over-leveraged American economy, an over-stretched American military, a multipolar oil market, a Eurasian core willing to underwrite alternative settlement architecture — presents the structural signature of all three: sensitivity, criticality and tipping. The Chinese strategist who reads this moment correctly, and places small stones at the right nodes, harvests effects out of all proportion to inputs not by mysticism but by accurate diagnosis. The American strategist who reads the same moment as a routine power competition, and deploys chess pieces, consumes resources without altering the configuration.

3. ACTIVE DEFENCE AND ITS MUTATION: TOWARDS OFFENSIVE DEFENCE

The Chinese military doctrine of Active Defence (jiji fangyu) has, since 1949, formalised this same logic at the level of grand strategy. FRAVEL's (2019, pp. 1–23) authoritative history establishes that the doctrine combines a defensive strategic posture — China does not initiate aggressive war — with an offensive operational and tactical posture once a strategic line has been crossed. Pre-emptive strikes are permissible at the operational level, but only after the strategic defensive trigger has been activated. Under XI Jinping the doctrine has been progressively sharpened through the 2017 Outline of Military Training, the 2019 white paper China's National Defense in the New Era, and the 2025 revised Common Regulations — the latter the first such revision since 2018, elevating "combat effectiveness" and the capacity to "fight and win wars" (United States Department of Defense, 2025, p. 12).

The Iran war has produced an apparent inflection. The Chinese legal scholar HUO Zhenxin, writing in the context of the April 2026 Anti-Foreign Sanctions decrees, described the new posture as a shift from "passive defense to a more offensive defensive posture" (HUO, in Geopolitechs, 2026, para. 5). What this paper calls Offensive Defence is not a new kinetic doctrine. It is the use of ostensibly defensive instruments — legal countermeasures, export licences, intelligence and satellite cooperation, dual-use exports — to pre-emptively disrupt and degrade an adversary’s strategic position before any kinetic encounter. It is, in weiqi terms, the placing of stones in apparently empty space which, only when the configuration is complete, reveals itself as encirclement.

4. FIVE STONES ON THE BOARD

4.1 The Rare-Earth Licence: A Procedural Stone (a sente move)

On 9 October 2025 the Chinese Ministry of Commerce issued six proclamations under Announcement No. 61 of 2025 adding five rare-earth metals (holmium, erbium, thulium, europium, ytterbium) to existing controls on seven others, and asserting extraterritorial jurisdiction over foreign-produced items containing 0.1 per cent or more of People’s Republic of China-origin rare earths or made using PRC-origin rare-earth processing technology (Mayer Brown, 2025, paras. 1–3; Al Jazeera, 2025, para. 4). The licensing process itself was rendered, in the language of one analyst, “Byzantine”: multi-month wait times effectively gave Beijing veto power over global technology production schedules (TechBuzz, 2025, para. 3).

The act was procedural. No army moved. No tariff was raised. No speech was given. Within weeks, however, the strategic effect was decisive. United States automakers began curbing production; semiconductor manufacturers faced supply disruption; the Pentagon scrambled to identify alternative supplies (Fortune, 2025a, paras. 2–4). Former White House senior advisor Dean BALL conceded publicly that “China has crafted a policy that gives it the power to forbid any country on Earth from participating in the modern economy” (BALL, in Fortune, 2025a, para. 5). The Council on Foreign Relations president Michael FROMAN observed:

> *“The United States can cut China off from the chips of today, but China can make it vastly harder to build the chips and other advanced technologies of tomorrow” (FROMAN, in Fortune, 2025a, para. 4).*

TRUMP responded with the chess-player’s instinct: a 100 per cent tariff threat, a threatened cancellation of the planned summit with XI, and a threat of new United States controls on critical software (Mayer Brown, 2025, para. 5). On 8 November 2025 China suspended the controls in exchange for an entire United

States tariff suspension package and the cancellation of various secondary measures (White House, 2025, para. 1). A single procedural stone — the modification of a licensing schedule — had, in roughly five weeks, extracted a strategic concession greater than any acquired through bluster. In weiqi terms this was sente: a move that forced the opponent to respond and held the initiative.

4.2 The Sanctions Decrees: A Legal Stone (a defensive joseki)

The same logic governed the legal-architectural manoeuvre of April–May 2026. On 7 April 2026 the State Council promulgated Decree No. 834, the Regulations on the Security of Industrial and Supply Chains (Morgan Lewis, 2026a, para. 2). On 13 April the State Council issued Decree No. 835, the Regulations on Countering Improper Extraterritorial Application of Foreign Laws (Geopolitechs, 2026, para. 1). On 4 May 2026 the Ministry of Commerce, invoking the 2021 Anti-Foreign Sanctions Law, explicitly directed Chinese firms to defy United States sanctions imposed on five private Chinese refineries linked to Iranian oil purchases — the first such overt directive in the law's history (Newsweek, 2026a, para. 1; Fortune, 2026a, para. 1).

The stones are technical: an article number, a personal-liability clause, a Malicious Entity List that captures any entity that "promotes" foreign sanctions (Morgan Lewis, 2026a, para. 4). But CUI Fan, the former Ministry of Commerce adviser, registered the strategic intent in the state-run China Report:

> *"The scope of these sanctions continues to expand, and the methods have become increasingly heavy-handed, showing a trend of further escalation" (CUI, in Fortune, 2026a, para. 3).*

The strategic effect, like the rare-earth manoeuvre, is asymmetric. The American sanctions instrument, the principal coercive tool of United States foreign policy since 1945, depends on the obedience of foreign banks and corporations. By making compliance with United States sanctions a Chinese legal offence, Beijing has converted every multinational corporation into a stress test of the dollar system. In weiqi terms this is a defensive joseki: a balanced local exchange whose value is determined by the global configuration it produces.

4.3 The Hormuz Toll: A Maritime Stone (a shoulder hit on the petro-dollar)

The third stone is Iran's, placed with Chinese underwriting. From early March 2026 the Islamic Revolutionary Guard Corps imposed a graduated toll regime in the Strait of Hormuz: up to $2 million per supertanker, with reduced fees for smaller vessels, paid — in confirmed cases — in Chinese yuan (Fortune, 2026b, paras. 3–5). Lloyd's List Intelligence has documented that "at least two vessels have [paid] and the payment is settled in yuan" (Lloyd's List, in Fortune, 2026b, para. 4).

HUDSON's diagnosis (2026a, para. 4) was that the Iran war would be the visible accelerant of a multipolar monetary order already under construction. By April 2026 it has become exactly that. DESAI (2026, para. 7) describes the same process as the dollar being "dealt a thousand cuts" — the slow accumulation of small, individually survivable, collectively fatal erosions of dollar primacy. The stone is small. The strategic effect — the demonstration that the principal global energy chokepoint can be tolled in renminbi, by a sanctioned state, against the explicit will of a hegemon enforcing a naval blockade — is regime-changing. In weiqi terms this is the shoulder hit: a single sacrificeable stone placed diagonally against the framework of American monetary dominance, deflating the territory rather than attacking it directly.

4.4 The Satellite and the Solid Fuel: An Intelligence Stone (a stone with aji)

The fourth stone is the Sino-Iranian intelligence partnership. The Financial Times investigation of 15 April 2026, citing leaked Iranian military documents, revealed that the IRGC Aerospace Force had secretly acquired control over the Chinese-built TEE-01B reconnaissance satellite for $36.6 million in late 2024 (Irish Times, 2026, paras. 3–5). The satellite was used during the March 2026 strikes to image United States bases at Prince Sultan Air Base in Saudi Arabia, Muwaffaq Salti Air Base in Jordan, the Fifth Fleet headquarters in Bahrain, and Erbil airport in Iraq, with time-stamped coordinates and before-and-after imagery (Army Recognition, 2026, para. 1).

In parallel, five Chinese ships have reportedly delivered approximately 1,000 tons of sodium perchlorate — a key precursor for solid rocket fuel — to Iran, enabling the reconstitution of Iran's missile inventory (19FortyFive, 2026, para. 3; Indo-Pacific Defense Forum, 2026, para. 4). Iran is also reported to be near finalising a deal for the Chinese CM-302 supersonic anti-ship cruise missile (Asia

Times, 2026, para. 1).

None of these acts is, individually, an act of war. Each is plausibly deniable. Each fits the legal definition of either a commercial transaction or a sovereign technology export. Together, however, they amount to the operational equivalent of ammunition resupply, target acquisition, and battle-damage assessment for an adversary in active hostilities with the United States. This is Offensive Defence in its purest form: defensive instruments converted to operationally offensive effects without crossing the kinetic threshold that would trigger an American military response. In weiqi terms this stone has aji: latent potential not yet activated, an unspent threat that constrains American operational planning by its mere presence on the board.

4.5 The Line-Swap: A Monetary Stone (sabaki by an ally)

The fifth stone was placed not by Beijing but by Abu Dhabi, with Beijing standing visibly behind it. On 19 April 2026 it emerged that UAE central bank governor Khaled Mohamed BALAMA had approached Treasury Secretary BESSENT and Federal Reserve officials on the margins of the IMF and World Bank meetings to explore a currency swap line, while signalling that without it the Emirates might be compelled to invoice oil cargoes in Chinese yuan or other non-dollar currencies (Fortune, 2026c, para. 3; Fortune, 2026d, para. 2). TRUMP confirmed that the request was "under consideration" (Responsible Statecraft, 2026, para. 2). On 28 April 2026 the UAE announced its withdrawal from OPEC, which Fortune characterised as a calculated repositioning made possible by the swap-line negotiations (Fortune, 2026e, para. 1). On 24 April BESSENT declared publicly that "many of our Gulf allies have requested swap lines" and that the United States was considering creating "new U.S. dollar funding centers in the Gulf and Asia" (CNBC, 2026a, para. 6).

The stone here belongs to neither pure Chinese strategy nor pure American counter-strategy. It is the product of the configuration: a GCC partner, having absorbed Iranian missile strikes alone while Washington bombed, has discovered that the cheapest available leverage against the United States is the visible threat of a partial petro-yuan. The threat is sufficient to extract from Washington a swap line of the kind previously reserved for G-7 central banks. In weiqi terms this is sabaki — light, flexible, escape-and-reposition play — performed by a partner who has discovered that the configuration of the larger game gives it room to move that it did not previously possess.

5. CALLING THE BLUFF: IRANIAN AND RUSSIAN OIL CONTINUES TO FLOW

The clearest empirical demonstration that the strategic configuration has shifted is that Iranian and Russian oil continues, in large and rising volumes, to flow to China, India, Indonesia, Malaysia and the wider Asian rim despite the United States naval blockade, the renewed UN snapback sanctions of 27 September 2025, and TRUMP's "maximum pressure" campaign. The numbers, drawn from independent tanker-tracking sources, are the bluff being called.

5.1 Iran

Despite the formal United States blockade, Iran exported an estimated 46.9 million barrels of crude in January 2026 alone, averaging 1.51 million barrels per day, with a wholesale value of approximately $3.05 billion (UANI, 2026a, paras. 1–2). The U.S. Treasury itself acknowledged in a 29 April 2026 advisory that "China purchases approximately 90% of Iran's oil exports" (CNBC, 2026b, para. 5). The Treasury further conceded that Iranian oil is routinely "blended with supplies from other countries or relabeled with forged documents to further disguise its origins, most commonly known as 'Malaysian blend'" (CNBC, 2026b, para. 8). The independent tracker United Against Nuclear Iran observed 679 ship-to-ship transfers of Iranian crude in Malaysian waters during 2025, up from 280 in 2023 (UANI, 2026b, para. 3). Even the Indian sanctions waiver of late March 2026 produced an immediate purchase: Reliance Industries bought five million barrels of Iranian crude at a $7 premium to Brent, with state-owned IOC, BPCL and HPCL planning resumed purchases (Iran International, 2026, para. 4).

5.2 Russia

Russia’s oil exports to Asia have, if anything, accelerated under the war regime. The Centre for Research on Energy and Clean Air documented that India was the second-largest buyer of Russian fossil fuels in March 2026, importing $5.8 billion of hydrocarbons in a single month, with state-owned Indian refineries increasing Russian imports by 148 per cent month-on-month (CREA, 2026, paras. 4–6). Independent shipping data shows Russian crude deliveries to India hit 2.25 million barrels per day at the March 2026 peak (Discovery Alert, 2026, para. 1), while Russian crude has accounted for roughly one-third of India’s total crude imports continuously since 2023 (ThePrint, 2026, para. 3).

The TRUMP administration’s response was telling: rather than enforcing its threats, it issued a 30-day waiver permitting Indian refiners to continue buying Russian crude (ThePrint, 2026, para. 5). After the United States suspended sanctions on already-loaded Russian tankers on 13 March, “Vietnam, Thailand, the Philippines, Indonesia and Sri Lanka began actively ordering Russian oil” (Ukrainska Pravda, 2026, para. 3). Indonesia separately announced an arrangement to receive 150 million barrels of Russian crude by year-end 2026, with Energy Minister Bahlil LAHADALIA confirming the deal (Antara, in Pravda EN, 2026, para. 1).

5.3 The American Naval Blockade Defied

The most consequential bluff being called is not the sanctions regime but the American naval blockade itself. On 13 April 2026, after the JD VANCE-led talks with Iran collapsed, TRUMP declared a United States naval blockade of all Iranian ports, announcing that it is “Sealed up Tight, until such time as Iran is able to make a DEAL” (TRUMP, in CNBC, 2026c, para. 4). United States Central Command released a public proclamation that the blockade would commence at 10 a.m. ET on 13 April 2026, applying “impartially against vessels of all nations entering or departing Iranian ports and coastal areas” and operationally enforced by more than a dozen warships, dozens of aircraft, and over 10,000 personnel within the first 24 hours (United States Central Command, 2026, paras. 1–3; Newsweek, 2026b, paras. 2–3). The empirical record of the seven weeks since is the record of a blockade being routinely circumvented.

By 20 April 2026, Lloyd’s List Intelligence had documented that at least 26 ships had bypassed the United States blockade line in both directions — towards

Iranian ports and departing from them, including 11 tankers laden with Iranian cargo that had managed to exit the Gulf of Oman (Lloyd's List, in CNN, 2026, para. 4). CNN reporting based on Kpler tanker-tracking data established that, by late April, "most vessels that have transited the Strait of Hormuz in recent days have taken the route designated by Iranian authorities, and about half of them loaded their cargoes at Iranian ports in defiance of the US blockade" (CNN, 2026, para. 5). The Iranian Revolutionary Guard Corps unilaterally redrew the shipping channel, designating a new route north of Larak Island through Iranian territorial waters and marking the previous IMO main lane as a "danger zone" (CNN, 2026, para. 7). Kpler maritime risk manager Dimitris AMPATZIDIS observed that "the official IMO lane has been almost entirely abandoned" (AMPATZIDIS, in CNN, 2026, para. 7).

The Al Jazeera investigation of 30 April 2026 documented in detail the operations of an Iranian shadow fleet of dark tankers — vessels transiting with fake flags, disabled AIS transponders and unspecified destinations — that has continued to move Iranian crude through the strait throughout the blockade (Al Jazeera, 2026b, paras. 2–4). During the open war phase, 68 energy carriers (36.2 per cent of all transits) crossed the strait, including ten directly linked to Iran; 41 of 57 bulk and general cargo ships crossing were tied to Tehran (Al Jazeera, 2026b, para. 8). Even the United States Department of Defense conceded the shadow-fleet challenge, with Pentagon officials publicly admitting that "stealth fleet" infiltration through AIS disabling and ship-to-ship transfers at sea remained a continuing problem (Voice of Emirates, 2026, para. 4). The blockade has thus been defied by the very fleet it was designed to interdict.

The strategic admission of failure came in TRUMP's late-April announcement of Project Freedom: a deployment of 15,000 service members and more than 100 land- and sea-based aircraft to "guide" the approximately 2,000 commercial vessels and 20,000 seafarers stranded in the Persian Gulf past Iranian control (Time, 2026, paras. 2–3). The official framing is that of a humanitarian rescue. The strategic substance is that the United States, having declared a blockade, has been forced to dedicate brigade-sized forces to escort ships past an Iranian regime that is supposed to have been blockaded. Iran has, in parallel, retaliated by seizing the Liberia-flagged MSC-Francesca and the Panama-flagged Epaminodes (CNBC, 2026c, para. 5). The world's most powerful navy, deployed at three-carrier strength, has been unable to close a strait against the Islamic

Revolutionary Guard Corps Navy and a fleet of dark tankers.

5.4 The Strategic Significance

The empirical pattern is decisive. The U.S. Treasury has been forced to publicly acknowledge that 90 per cent of Iran's oil exports continue, that the "Malaysian blend" laundering technique is operating at industrial scale, and that Indian refiners are buying sanctioned Iranian crude at a premium. Russian crude moves to India in volumes that briefly exceeded two million barrels per day; Russian crude moves to Indonesia, Vietnam, Thailand, the Philippines and Sri Lanka in rising volumes; the United States has been forced to issue waivers rather than enforce its own blockade. The naval blockade itself, declared with the full rhetorical weight of presidential authority and three carrier strike groups, has been bypassed by at least 26 ships in seven weeks, with about half of all Hormuz transits loading their cargoes at Iranian ports.

Each tanker that crosses the Hormuz line, each ship-to-ship transfer in Malaysian waters, each Russian cargo discharged in Visakhapatnam or Cilacap, each shadow-fleet vessel transiting north of Larak Island with its AIS transponder dark, is a stone placed on the board. The aggregate effect is the demonstration that American deterrence is materially broken: the threat of secondary sanctions is being ignored not by ideological opponents but by every major energy importer in Asia, including formal United States partners; the threat of naval interdiction is being routinely circumvented by a sanctioned state and its dark fleet. The bluff has been called twice over — first by sanctions evasion, then by blockade defiance. America, on the empirical evidence of barrels and bills of lading, is materially weaker than it has imagined itself to be.

6. READING THE BOARD: HOW THE FIVE STONES CONNECT

What the American policy community has consistently missed is that the five stones are not five separate acts. They are a single configuration. LAI (2004, p. 9) describes the weiqi player's discipline:

> *"Multiple contests take place simultaneously in different regions of the board. The balance of forces shifts incrementally with each move" (LAI, 2004, p. 9).*

Read across these five sub-domains, the configuration becomes legible:

1. **First**, the rare-earth licence (October 2025) demonstrated that a procedural change can extract strategic concessions.
2. **Second**, the sanctions decrees (April 2026) extended the demonstration into the legal domain.
3. **Third**, the Hormuz toll (March 2026 onwards) extended it into the monetary domain.
4. **Fourth**, the satellite and the rocket fuel (2024–2026) extended it into the intelligence and military-industrial domain.
5. **Fifth**, the line-swap (April 2026) extended it into the relationship between the United States and its own allies.

Each move was placed in apparently empty territory. Each move was, individually, defensible as a sovereign or commercial act. Each move, in retrospect, was placed precisely where it would, in conjunction with the others, encircle.

HUDSON (2026b, para. 5) draws the structural implication:

> *"Pricing the oils in RMB has turned the tables on the United States by using its control of the world oil trade as a means of supporting the dollar" (HUDSON, 2026b, para. 5).*

HUDSON's longer-running collaboration with DESAI on the Geopolitical Economy Hour (HUDSON and DESAI, 2023) established the analytical framework: the dollar order erodes not by a single decisive blow but by the slow accumulation of small departures, each individually tolerable, collectively fatal. The 2026 conjuncture is the moment at which the slow erosion has crossed the threshold into observable cascade.

7. WHY AMERICAN STRATEGIC CULTURE CANNOT SEE THE MOVE

The American policy community's inability to read these stones is not a failure of intelligence. It is a failure of strategic socialisation. The KISSINGER (2011, p. 23) contrast — chess prizing the decisive clash of forces, weiqi prizing subtlety, indirection and the patient accumulation of relative advantage — is not merely descriptive but predictive. The American military build-up in Southwest Asia — three carrier strike groups, more than 160 tankers, F-22s and F-15Es and F-35Bs — is a chess move: the deployment of high-value pieces toward what is conceived as a centre of gravity, in the expectation that the threat will compel a settlement on American terms.

The Chinese counter-moves are weiqi moves: small, peripheral, procedural, distributed, individually trivial, jointly decisive. The chess player, looking at the board, sees no opposing major piece in confrontation with his own. He concludes that he is winning. He is, in fact, encircled.

This is the cognitive substrate of MEARSHEIMER's judgement that the war is "a colossal blunder" in which "the other side has all the cards" (MEARSHEIMER, in HPHerald, 2026, para. 6). The cards, on the table that the American strategic community is reading, do not exist. They are stones, on a board the American strategic community does not know it is playing.

8. CONCLUSION: THE STONES ARE ALREADY PLACED

Strategic success in a structurally non-linear conjuncture (JERVIS, 1997) at a moment of hegemonic transition (GILPIN, 1981; ARRIGHI, 1994) depends not on the relative size of one's pieces but on the accuracy of one's reading of the moment. The Chinese strategic style succeeds because it reads the conjuncture correctly: it sees that the system is stressed, that small inputs at the right node will cascade, and that empty space — in licensing, in legal architecture, in payment rails, in satellite contracts — is precisely where the decisive stones must be placed.

The surge in Southwest Asia is, in this reading, most plausibly the kinetic component of an exit strategy: TRUMP wants out of the escalation quagmire, but cannot withdraw without a performative act sufficiently spectacular to be retrofitted, in domestic media, as victory. It is also the textbook signature of the escalation trap, in which a power that has lost the ability to win attempts instead to escalate its way out — the same logic that produced, and ultimately defeated, the United States in Vietnam (KENNEDY, 1987, pp. 514–540; COPELAND, 2000, pp. 11–22). The historical record of escalation traps is unambiguous: they almost never restore the deterrent credibility they were designed to repair, and they routinely deepen the very strategic decline they were meant to arrest.

Beyond this immediate diagnosis, three more significant insights emerge from the analysis:

1. **First**, Iran, China and East Asia have weakened American deterrence to the point where Washington feels compelled to escalate in order to attempt — through a single performative act of force — to re-establish escalation dominance and, more fundamentally, to restore the credibility of the deterrent threat itself. The surge is thus not a sign of strength but the empirical signature of a deterrent regime in structural failure.
2. **Second**, Iranian, Chinese and Asian strategy and tactics have eroded the battlespace deterrence — particularly in its economic and financial dimension — by breaking the sanctions and blockade regime that the United States has demonstrably been unable to enforce. The strategic effect is durable rather than episodic: every barrel that crosses the Hormuz line in defiance of the blockade, every yuan-denominated toll paid in the Strait, every multinational forced to choose between United States and Chinese law, alters the long-run balance of power.
3. **Third**, the analysis confirms that contemporary warfare unfolds in a logic in which economic security, as one constitutive dimension of a compound battlespace, has become among the most dominant theatres of conflict. The strategic imperative for any state in the present international order can therefore be stated economically: *securitise and secure the national economy or perish*. Hegemonic durability is no longer a function of carriers, bombers and fifth-generation fighters alone; it is a function of the integrity of the supply chain, the autonomy of the payment rail, and the credibility of the legal architecture that holds them together.

KISSINGER (2011, p. 30) anticipated this:

> *"A talented wei qi player moves into 'empty' spaces on the board, gradually mitigating the strategic potential of his opponent's pieces" (KISSINGER, 2011, p. 30).*

The empty spaces on the 2026 board were a rare-earth licensing schedule, a sanctions-blocking decree, a maritime toll, a satellite contract, and a swap-line conversation. The opponent's pieces — aircraft carriers, tankers, sanctions, the dollar — are still on the board. They are simply no longer where they need to be to win. The Chinese and Asian strategy, in the end, has not defeated American power in any classical sense; it has rendered it strategically irrelevant. That, in the language of shi, is what victory looks like.

KISSINGER (2011, p. 23) put it most economically:

> *"If chess is about the decisive battle, wei qi is about the protracted campaign. The chess player aims for total victory. The wei qi player seeks relative advantage" (KISSINGER, 2011, p. 23).*

The American strategic community, deployed at three-carrier strength against a sanctioned regional power, is still searching for the decisive battle. The Chinese and Asian players, scattered quietly across the licensing schedules and payment rails and shipping channels of the world economy, have already won the protracted campaign — and the chess player at the centre of the board has not yet noticed.

REFERENCES

19FORTYFIVE (2026) *China Is Helping Iran Rebuild Its Missile Program*, April. Available at: https://www.19fortyfive.com/2026/04/china-iran-missile-program/ (Accessed: 4 May 2026).

AEROSPACE GLOBAL NEWS (2026) *120+ US military aircraft head to Middle East: Here's what it means*, 18 February. Available at: https://aerospaceglobalnews.com/news/us-military-aircraft-middle-east-iran/ (Accessed: 5 May 2026).

AL JAZEERA (2025) *China tightens export controls on rare-earth metals*, 10 October. Available at: https://www.aljazeera.com/news/2025/10/10/china-rare-earth-controls (Accessed: 4 May 2026).

AL JAZEERA (2026b) *Tracking the shadow fleet: How Iran evaded the US naval blockade in Hormuz*, 30 April. Available at: https://www.aljazeera.com/economy/2026/4/30/tracking-the-shadow-fleet (Accessed: 4 May 2026).

AL JAZEERA (2026c) *Could the US–Iran war become a protracted 'frozen' conflict?*, 30 April. Available at: https://www.aljazeera.com/news/2026/4/30/could-the-us-iran-war-become-a-protracted-frozen-conflict (Accessed: 4 May 2026).

ANTARA, in PRAVDA EN (2026) *Indonesia to receive 150 million barrels of Russian crude*, May. Available at: https://english.pravda.ru/world/indonesia-russia-oil/ (Accessed: 4 May 2026).

ARMY RECOGNITION (2026) *Iran purchased Chinese TEE-01B high-resolution satellite to target US bases during March 2026 attacks*, April. Available at: https://www.armyrecognition.com/news/aerospace-news/2026 (Accessed: 4 May 2026).

ARRIGHI, G. (1994) *The Long Twentieth Century: Money, Power and the Origins of Our Times*. London: Verso.

ASIA TIMES (2026) *China close to giving Iran a ship-killer as US carriers close in*, 3 March. Available at: https://asiatimes.com/2026/02/china-iran-ship-killer/ (Accessed: 4 May 2026).

BAK, P., TANG, C. and WIESENFELD, K. (1987) 'Self-Organized Criticality: An Explanation of 1/f Noise', *Physical Review Letters*, 59(4), pp. 381–384.

BLOOMBERG (2026) *US Seeks to Deploy Hypersonic Missile For the First Time Against Iran*, 29 April. Available at: https://www.bloomberg.com/news/articles/2026-04-29/us-seeks-to-deploy-hypersonic-for-the-first-time-against-iran (Accessed: 5 May 2026).

CNBC (2026a) *Bessent defends U.S. dollar swap lines as Iran war harms global finances*, 25 April. Available at:

https://www.cnbc.com/2026/04/25/bessent-iran-war-uae-swap-lines.html (Accessed: 4 May 2026).

CNBC (2026b) *Treasury advisory on Iranian oil networks*, 30 April. Available at: https://www.cnbc.com/2026/04/30/treasury-iran-oil-china/ (Accessed: 4 May 2026).

CNBC (2026c) *U.S.–Iran war evolves into naval standoff over Strait of Hormuz after both countries seize ships*, 23 April. Available at: https://www.cnbc.com/2026/04/23/iran-war-strait-hormuz-tanker-traffic-oil.html (Accessed: 4 May 2026).

CNN (2026) *Visualizing shipping through the Strait of Hormuz since war began*, 29 April. Available at: https://www.cnn.com/2026/04/29/world/iran-war-gulf-hormuz-shipping-maps-intl-vis (Accessed: 4 May 2026).

CNN (2026b) *US and Iranian militaries trade shots as Strait of Hormuz tensions escalate*, 4 May. Available at: https://www.cnn.com/2026/05/04/world/live-news/iran-war-hormuz-trump (Accessed: 4 May 2026).

COPELAND, D. C. (2000) *The Origins of Major War*. Ithaca: Cornell University Press.

CREA (Centre for Research on Energy and Clean Air) (2026) *March 2026 Russia Fossil Fuel Tracker*. Available at: https://energyandcleanair.org/2026/04/russia-fossil-fuel-tracker-march/ (Accessed: 4 May 2026).

DEFENSE EXPRESS (2026) *U.S. Wants to Deploy Dark Eagle Hypersonic Missiles Against Iran — But There's a Catch*, 1 May. Available at: https://en.defence-ua.com/news/us_wants_to_deploy_dark_eagle_hypersonic_missiles_against_iran-18344.html (Accessed: 5 May 2026).

DEFENSESCOOP (2026) *Army to 'ramp up all munitions across the board,' general says*, 18 March. Available at: https://defensescoop.com/2026/03/18/army-munitions-stockpiles-prsm-dark-eagle-missiles/ (Accessed: 5 May 2026).

DESAI, R. (2026) *Dollar Being Dealt a Thousand Cuts: The US Dollar after the Iran War*, April. Available at: https://radicaldesai.substack.com/p/dollar-being-dealt-a-thousand-cuts (Accessed: 4 May 2026).

DISCOVERY ALERT (2026) *India's Russian Crude Imports Hit 2.25 mbpd in March 2026*, April. Available at: https://discoveryalert.com.au/2026/04/india-russia-crude-imports/ (Accessed: 4 May 2026).

FAIRBAIRN, J. and HALL, T. M. (2007) *The Go Companion: Go in History and Culture*. Richmond: Slate & Shell.

FORTUNE (2025a) *China's rare earth controls can 'forbid any country on Earth from participating in the modern economy,' former White House advisor warns*, 12

October. Available at: https://fortune.com/2025/10/12/china-rare-earth-export-controls/ (Accessed: 4 May 2026).

FORTUNE (2026a) *China's unprecedented defiance of U.S. sanctions triggers showdown*, 4 May. Available at: https://fortune.com/2026/05/04/china-defiance-us-sanctions-iran-oil/ (Accessed: 4 May 2026).

FORTUNE (2026b) *Iran is already charging a toll, in Yuan, for oil sold through Strait of Hormuz*, 26 March. Available at: https://fortune.com/2026/03/26/iran-toll-strait-of-hormuz-yuan/ (Accessed: 4 May 2026).

FORTUNE (2026c) *UAE officials reportedly warned they may be forced to use yuan or other currencies*, 20 April. Available at: https://fortune.com/2026/04/20/uae-central-bank-dollar-lifeline/ (Accessed: 4 May 2026).

FORTUNE (2026d) *UAE in talks with U.S. for possible financial lifeline, WSJ says*, 19 April. Available at: https://fortune.com/2026/04/19/uae-talks-us-financial-lifeline/ (Accessed: 4 May 2026).

FORTUNE (2026e) *OPEC shocker as UAE leaves oil cartel days after negotiating swap lines with Bessent's Treasury*, 28 April. Available at: https://fortune.com/2026/04/28/uae-leaves-opec-bessent-swap-line/ (Accessed: 4 May 2026).

FRAVEL, M. T. (2019) *Active Defense: China's Military Strategy Since 1949*. Princeton: Princeton University Press.

GEOPOLITECHS (2026) *China Unveils New Rules to Crack Down on "Malicious Entities" Complying with Foreign Extraterritorial Sanctions*, April. Available at: https://www.geopolitechs.org/p/china-unveils-new-rules-to-crack (Accessed: 4 May 2026).

GILPIN, R. (1981) *War and Change in World Politics*. Cambridge: Cambridge University Press.

HOUSE OF COMMONS LIBRARY (2026) *US–Iran ceasefire and nuclear talks in 2026*, briefing CBP-10637, 4 May. Available at: https://commonslibrary.parliament.uk/research-briefings/cbp-10637/ (Accessed: 4 May 2026).

HPHERALD (2026) *Mearsheimer: Trump's Iran War a Colossal Blunder*, April. Available at: https://hpherald.com/2026/04/mearsheimer-iran-blunder/ (Accessed: 4 May 2026).

HUDSON, M. (2026a) *Multipolar Oil Markets Are Now a Reality*, 27 March. Available at: https://michael-hudson.com/2026/03/multipolar-oil-markets/ (Accessed: 4 May

2026).

HUDSON, M. (2026b) *Wall Street's Exit Plan Is You*, 25 April. Available at: https://michael-hudson.com/2026/04/wall-streets-exit-plan/ (Accessed: 4 May 2026).

HUDSON, M. and DESAI, R. (2023) *Geopolitical Economy Hour: Multipolarity and the Decline of US Hegemony*. Available at: https://geopoliticaleconomy.com/2023/01/13/multipolarity/ (Accessed: 4 May 2026).

INDO-PACIFIC DEFENSE FORUM (2026) *China's support to Iran's weapons program contributes to civilian deaths*, April. Available at: https://ipdefenseforum.com/2026/04/chinas-support-to-irans-weapons-program/ (Accessed: 4 May 2026).

IRAN INTERNATIONAL (2026) *US waiver on Iran sanctions redirects oil flows from China toward India*, 27 March. Available at: https://www.iranintl.com/en/202603279252 (Accessed: 4 May 2026).

IRISH TIMES (2026) *Iran used Chinese spy satellite to target US bases*, 15 April. Available at: https://www.irishtimes.com/world/middle-east/2026/04/15/iran-chinese-satellite-us-bases/ (Accessed: 4 May 2026).

JERVIS, R. (1997) *System Effects: Complexity in Political and Social Life*. Princeton: Princeton University Press.

KAUTILYA (c. 4th century BCE/1992) *The Arthashastra*. Edited and translated by L. N. RANGARAJAN. New Delhi: Penguin Books India.

KENNEDY, P. (1987) *The Rise and Fall of the Great Powers: Economic Change and Military Conflict from 1500 to 2000*. New York: Random House.

KISSINGER, H. (2011) *On China*. New York: Penguin Press.

LAI, D. (2004) *Learning from the Stones: A Go Approach to Mastering China's Strategic Concept, Shi*. Carlisle: U.S. Army War College, Strategic Studies Institute.

LORENZ, E. N. (1963) 'Deterministic Nonperiodic Flow', *Journal of the Atmospheric Sciences*, 20(2), pp. 130–141.

MAYER BROWN (2025) *PRC Announces New Export Controls on Rare Earth and Battery Materials and Technology*, October. Available at: https://www.mayerbrown.com/en/insights/publications/2025/10/prc-rare-earth-export-controls (Accessed: 4 May 2026).

MEARSHEIMER, J. J. (2026a) *Trump committed a colossal blunder*, interview, April. Available at: https://mearsheimer.substack.com/p/trump-iran-blunder (Accessed: 4 May 2026).

MEARSHEIMER, J. J. (2026b) *The Fallout from the Iran Debacle*, 1 May. Available at: https://mearsheimer.substack.com/p/the-fallout-from-the-iran-debacle (Accessed: 4 May 2026).

MIDDLE EAST FORUM (2026) *The US Buildup in the Middle East: A Strategic Assessment*, March. Available at: https://www.meforum.org/2026/03/us-buildup-middle-east/ (Accessed: 4 May 2026).

MORGAN LEWIS (2026a) *China's State Council Issues Decree No. 834 on Industrial and Supply Chain Security*, April. Available at: https://www.morganlewis.com/pubs/2026/04/china-decree-834/ (Accessed: 4 May 2026).

NEWSWEEK (2026a) *China directs firms to defy US sanctions on Iran-linked refineries*, May. Available at: https://www.newsweek.com/china-defy-us-sanctions-iran-refineries (Accessed: 4 May 2026).

NEWSWEEK (2026b) *CENTCOM Gives Details on US Blockade of Iran After Trump's Announcement*, 13 April. Available at: https://www.newsweek.com/centcom-details-us-blockade-iran-after-trump-announcement (Accessed: 4 May 2026).

NEWSWEEK (2026d) *What is the Dark Eagle hypersonic missile U.S. may use in Iran War?*, 2 May. Available at: https://www.newsweek.com/what-is-the-dark-eagle-hypersonic-missile-u-s-wants-for-iran-war (Accessed: 5 May 2026).

NEW YORK TIMES (2026) *Iranian Strikes Inflicted Heavy Damage on U.S. Bases in the Gulf, Forcing Reliance on Carriers and Diego Garcia*, 22 April. Available at: https://www.nytimes.com/2026/04/22/world/middleeast/iran-us-bases-damage-diego-garcia.html (Accessed: 5 May 2026).

ORGANSKI, A. F. K. and KUGLER, J. (1980) *The War Ledger*. Chicago: University of Chicago Press.

POWELL, R. (2006) 'War as a Commitment Problem', *International Organization*, 60(1), pp. 169–203.

RADIO FREE EUROPE/RADIO LIBERTY (2026) *As Cease-Fire With Iran Wavers, US Expands Its Military Footprint*, 28 April. Available at: https://www.rferl.org/a/iran-us-strait-of-hormuz-blockade/33744467.html (Accessed: 4 May 2026).

RESPONSIBLE STATECRAFT (2026) *UAE's dollar swap threats show how brittle these US alliances can be*, April. Available at: https://responsiblestatecraft.org/uae-dollar-iran-war/ (Accessed: 4 May 2026).

SCHELLING, T. C. (1971) 'Dynamic Models of Segregation', *Journal of Mathematical Sociology*, 1(2), pp. 143–186.

SILVER, D. et al. (2016) 'Mastering the game of Go with deep neural networks and tree search', *Nature*, 529(7587), pp. 484–489.

SUN TZU (c. 500 BCE/2003) *The Art of War*. Translated by R. D. SAWYER. New York: Basic Books.

TECHBUZZ (2025) *China’s Byzantine Rare Earth Licensing System*, November. Available at: https://techbuzz.com/2025/11/china-rare-earth-licensing/ (Accessed: 4 May 2026).

THEPRINT (2026) *India gets 30-day waiver on Russian crude*, April. Available at: https://theprint.in/2026/04/india-russia-crude-waiver/ (Accessed: 4 May 2026).

TIME (2026) *What to Know About Trump’s Plan to ‘Guide’ Ships Out of the Strait of Hormuz*, 4 May. Available at: https://time.com/article/2026/05/04/strait-hormuz-ships-guide-escort-ceasefire-us-iran-trump/ (Accessed: 4 May 2026).

TIMES OF ISRAEL (2026) *9 US refueling tankers arrived at Ben Gurion overnight, tracking data shows*, 27 February. Available at: https://www.timesofisrael.com/liveblog_entry/9-us-refueling-tankers-arrived-at-ben-gurion-overnight-tracking-data-shows/ (Accessed: 5 May 2026).

UANI (United Against Nuclear Iran) (2026a) *Iran Oil Tracker, January 2026*. Available at: https://www.unitedagainstnucleariran.com/iran-oil-tracker/january-2026 (Accessed: 4 May 2026).

UANI (United Against Nuclear Iran) (2026b) *Malaysian Blend: Ship-to-Ship Transfers in 2025*. Available at: https://www.unitedagainstnucleariran.com/malaysian-blend-2025 (Accessed: 4 May 2026).

UKRAINSKA PRAVDA (2026) *Vietnam, Thailand, the Philippines, Indonesia and Sri Lanka resume Russian oil purchases*, March. Available at: https://www.pravda.com.ua/eng/2026/03/asia-russia-oil/ (Accessed: 4 May 2026).

UNITED STATES CENTRAL COMMAND (2026) *U.S. to Blockade Ships Entering or Exiting Iranian Ports*, press release, 13 April. Available at: https://www.centcom.mil/MEDIA/PRESS-RELEASES/Press-Release-View/Article/4457255/us-to-blockade-ships-entering-or-exiting-iranian-ports/ (Accessed: 4 May 2026).

UNITED STATES DEPARTMENT OF DEFENSE (2025) *Annual Report to Congress: Military and Security Developments Involving the People’s Republic of China 2025*. Washington, DC: Office of the Secretary of Defense.

UNITED STATES DEPARTMENT OF WAR (2026) *Operation Epic Fury*. Available at: https://www.war.gov/Spotlights/Operation-Epic-Fury/ (Accessed: 5 May 2026).

VOICE OF EMIRATES (2026) *Tightening the naval blockade: CENTCOM announces it has prevented 45 ships from entering Iranian ports*, 2 May. Available at: https://www.voiceofemirates.com/en/news/2026/05/02/tightening-the-naval-blockade/ (Accessed: 4 May 2026).

WHAT REALLY HAPPENED (2026) *John Mearsheimer: Iran War Greatest Foreign Policy Blunder in US History*, May. Available at: https://www.whatreallyhappened.com/NEW/index.php/stories/john-mearsheimer-iran-war-greatest-foreign-policy-blu nder-us-history (Accessed: 4 May 2026).

WHITE HOUSE (2025) *Fact Sheet: U.S.–China Trade Agreement of 8 November 2025*. Available at: https://www.whitehouse.gov/briefing-room/2025/11/us-china-trade-agreement (Accessed: 4 May 2026).