



Iran and the Axis of Aggressors, Part I: China

September 3, 2025

Featuring Grant Rumley and Craig Singleton

Hosted by Mark Dubowitz

SINGLETON: China is by far and away the biggest enabler of Iran surveillance state. They sell facial recognition cameras that mainline into a country's registration database of everyone in their country. And in near real time, they can scan your face at a protest and align it with your identity cards, like your birth certificate, passport, and then come knock on your door. And that's exactly what happened in the 2023 protests in Iran. Again, remember the Chinese provided them with a lot of the telco backbone through Huawei. And now you can put CCTV cameras around the whole country that are all, again, mainlined into command centers. And then you can use that technology to track and monitor and suppress. They did it at scale using AI in China and then they exported this to all these other countries. And Iran is like the testbed for the Middle East. The beta test environment. It's pretty alarming stuff.

Hi, this is Craig Singleton. I direct FDD's China Program and was honored to join this episode of "The Iran Breakdown" with my colleague and friend Grant Rumley. Before we get into the episode — which we recorded before the joint U.S.-Israeli strikes on Iran's nuclear and missile programs — I wanted to share my letter that was published in the *Wall Street Journal*. It's called "Where Was Xi Jinping in Iran's Hour of Need?" and it fills in the gaps between when our episode was recorded and now, after the 12-Day War. I hope you'll find the information in both the letter and the episode of value in understanding the depth of the China-Iran alliance.

And with that, here's my piece from the *Wall Street Journal*.

Seth Cropsey is right that Israeli strikes on Iran have handed the U.S. a strategic opening. Yet the dividend runs beyond the Gulf. China's crisis response—limited to statements, with no tangible support for Tehran—further exposed the gap between Beijing's great-power rhetoric and its reach, an imbalance Washington should press while the Trump-brokered cease-fire holds.

After Beijing and Tehran inked their 2021 "comprehensive partnership," Iran expected a bulwark. It got a bystander. China's representative to the UN called Israel's raid a "dangerous precedent," and China Daily—the Communist Party's English-language mouthpiece—branded Israel a "reckless war machine." But beyond that, Beijing sent Tehran no drones or missile parts, extended no emergency credit and floated no credible peace plan, proof that its promises vanish when real costs loom.

Why the caution? China lacks the forward bases and secure sea lanes needed to project hard power. Roughly 90% of Iran's crude also goes to Chinese recipients who fear triggering U.S. secondary sanctions. Openly arming Tehran, moreover, would alienate Riyadh and Abu Dhabi, Beijing's energy lifelines. In other words, self-interest, not solidarity, kept China on the sidelines.

China's no-show in Tehran's hour of need also revealed the China-Russia-Iran axis for what it is: a grouping bound by grievance, not the capacity to fight together. It further blunted Beijing's pitch as a credible security partner. Hedging capitals in the region and elsewhere should see the contrast with the U.S.: one supplier arrives when shots are fired, the other issues communiques from afar.

With the cease-fire in effect, Washington should turn Israel's tactical gains into strategic leverage. Tightening sanctions on the Chinese refiners, shippers and banks that bankroll Iran's oil trade would drain Tehran's reconstruction funds and lay bare that China underwrites Iran chiefly for cheap barrels, not commitment. Meanwhile, if Iran threatens the Strait of Hormuz, the US should signal that China would be held responsible for failing to restrain its junior partner. These and other steps would widen cracks in the Axis and remind other countries that, multipolar talk aside, only America has the tools and trust to shape war and peace.

And with that, thanks for listening, and I hope you enjoy this episode of "The Iran Breakdown."



Iran and the Axis of Aggressors, Part I: China

September 3, 2025

Featuring Grant Rumley and Craig Singleton

Hosted by Mark Dubowitz

SINGLETON: The thing about the relationship that's so interesting is it's always been asymmetric. China has always seen Iran as useful, but not an equal. And that dynamic, certainly, I think exists today.

DUBOWITZ: Gentlemen, welcome. It's great to have you both.

RUMLEY: Thanks for having us.

SINGLETON: Yeah, thanks for having us.

DUBOWITZ: Such a pleasure. I see Craig all the time, but Grant, it's really a wonder to see you again.

RUMLEY: It's wonderful to be back here.

DUBOWITZ: After all these years. I think you were at FDD, what, 11 years ago?

RUMLEY: I think so, yeah. 2014 to 2018.

DUBOWITZ: Wow. Well, we feel the loss.

(LAUGHTER)

But we see you out there, and you're doing extraordinary work with our great friends of the Washington Institute. I want to start, as I always do in these podcasts, with a little bit about your personal background. So Craig, let's begin with you. Tell us a little bit about yourself, tell us what you can tell us, and what you can't tell us. The fun stuff will be the stuff you can't tell us, but where'd you grow up? How'd you get into this business? How did you become obsessed with China?

SINGLETON: Yeah, no, thanks Mark. It's great to be here with you guys, especially with Grant, whose research I follow and read all the time. I'm voracious on it.

I think I got here by happenstance. It was not planned at all. I think it's sort of the best career path. I was a Middle East guy, like I think all of us, for a long time. But when I was a U.S. diplomat I got a taste for China and North Korea, and I think I realized that it was probably the future, and it was something that we weren't thinking about the right way. We were always talking about how do we coexist alongside China, and I think as you've learned about the Chinese Communist Party, you recognize that we can't compete to coexist, we have to compete to win. And it felt like we weren't really talking about that.

So a few years ago, I got a chance to leave government, and come here to FDD. It was probably the best riskiest decision I ever made. But in addition to leading our China program here, I have the pleasure of teaching at Stanford, where I teach, I guess the next generation. They're so young, and interested in China, about great power competition. And so I get to talk to the young kids, the youth, as I call them, about what the China challenge will look like. And then engage here, about real world solutions to what is increasingly a pretty serious problem for us.

DUBOWITZ: And you came to us, as I remember, a great recommendation from Juan Zarate, who's been on a previous episode. Juan was already one of the best talent spotters in Washington, so he sent great people our way. Wonderful that you're here. But where are you from? Before you became a State Department guy, you must have had a life before?

SINGLETON: Do you? I don't know if you do. I mean, this was all pre-Facebook, pre-internet. No, I'm born and raised New York and South Florida, I think like every young Jewish guy in this town. So I went to the University of Florida for undergrad, joined government almost right away.

DUBOWITZ: Right out of undergrad?



Iran and the Axis of Aggressors, Part I: China

September 3, 2025

Featuring Grant Rumley and Craig Singleton

Hosted by Mark Dubowitz

SINGLETON: Yeah, they poached me pretty early, which was probably great. Because I had no idea what I was going to do. And then it was just a wild adventure overseas, tours in the Middle East, Asia, Latin America, and then ending up back in DC.

DUBOWITZ: Wonderful. Grant.

RUMLEY: Hey.

DUBOWITZ: Let's start from the beginning. Mr. And Mrs. Rumley.

RUMLEY: Well, yeah, so I—

DUBOWITZ: You're from where, originally?

RUMLEY: Small town in Michigan, outside of Detroit.

DUBOWITZ: So a Red Wings fan?

RUMLEY: Of course. Yeah. Sorry about that. I know we've got our Toronto Maple Leafs rivalry, here.

SINGLETON: A sore point.

RUMLEY: Yeah, I mean, like so many kids who was a teenager or preteen, at 9/11. Obviously, that hit close to home, pretty quickly. It also hit the Rumleys, as well. I mean, I had one cousin deploy to Iraq, another deployed to Afghanistan, my little brother joined the Air Force. So the whole family obviously started taking an interest in the Middle East, and I really got into, I went to Michigan State, and I really got into Arabic when I was there. And really took a liking to it, had some fun studying it, spent some time studying in Egypt and then the West Bank for a little bit, as well. And then ultimately ended up doing grad school at the Hebrew University of Jerusalem, the Harvard of the Middle East, many of us say.

SINGLETON: I don't know if that's such a good thing, by the way.

(LAUGHTER)

RUMLEY: That's right. But basically ended up doing a ton of freelance journalism out of the West Bank, doing a lot of reporting on Palestinian politics. That's how I got connected with Jon Schanzer here, and was doing a lot of great work with him and FDD. Then he reached out when I was about to complete grad school and said, "Hey, do you want to come to FDD and work as an RA?" And so, took it, didn't even think twice about it, ended up here. What an amazing decision. And then I did about four years here, wrote a book on Mahmoud Abbas, the only English-language biography on him, because no one else wants to take that task.

DUBOWITZ: I remember FDD got sued by Abbas's guys. Did we get sued over your book, or over something else?

RUMLEY: I think something else. I was threatened with a lawsuit. One of them called me on Easter morning, of all days, and threatened me with a lawsuit. But I mean, if you don't get threatened with a lawsuit, you're not actually doing the good writing at that point. So did the book, and then had a great opportunity to go into government in 2018, into the first Trump administration, and work in the SecDef's Middle East policy office. That's really where, I mean, everything up to that point had been sort of typical Middle East studies, Arabic, a little bit of Hebrew. Working on Israel, the Palestinians, the region. But that really, you recall, in 2018. Secretary Mattis said, "The war on terror is no longer the forcing function of the U.S. military. Great power competition is." And so—

DUBOWITZ: So you became a great power guy.



Iran and the Axis of Aggressors, Part I: China

September 3, 2025

Featuring Grant Rumley and Craig Singleton

Hosted by Mark Dubowitz

RUMLEY: I mean, think out of – you had to, right?

DUBOWITZ: Right.

RUMLEY: You're in the Middle East office and suddenly you have to start understanding China and Russia, not only in the region, but I think the big picture strategic competition. You see what, the world's biggest Navy, soon to be world's biggest Air Force, the rate and clip at which they're producing material, the aggression towards their neighbors. And some of those policies start trickling into theaters beyond their near seas, into the Middle East, and you're seeing that firsthand in government.

So that was fascinating to me, and really, an indoctrination in government. And then my time was up a couple of months into the Biden administration, and rolled over to the Washington Institute to work with Rob [Satloff], and Mike Singh, and Dana [Stroul], on sort of standing up our own great power competition effort.

DUBOWITZ: And you guys have done a phenomenal job there. So what we try to do in this podcast is also a little bit of history, to really understand this relationship, this China-Iran relationship. Craig, tell us a little bit about the relationship. I mean, we'll talk about the contemporary reality, but give us a little bit of history of how China and Iran developed the close ties they have today.

SINGLETON: Yeah, I mean, it's not a new relationship. It's old, and it's opportunistic. And I think it was really shaped and rooted by mutual isolation. The two countries like to say that their relationship goes back to the Silk Road, and there is some truth in that, but obviously neither country existed in its current form back then. 1971 was the pivotal inflection point in their relationship. This is when Iran recognizes the PRC [People's Republic of China]. And again, it was sort of in that moment of establishing diplomatic relations. And previously they did have some trade relationships, and some informal engagements, but that's really the moment where the relationship starts to take off, where the cornerstone is, sort of.

DUBOWITZ: And was that unusual, in '71, to recognize the PRC as China?

SINGLETON: It wasn't unusual per se, but what was unusual is that they had been engaging for decades, really from 1920 on, in their current form without any formal recognition. It was just an unusual sort of relationship. But then '71 changes everything.

And the thing about the relationship that's so interesting is it's always been asymmetric. China has always seen Iran as useful, but not an equal. And that dynamic, certainly, I think exists today. What they do share, obviously, is a deep loathing in the United States. Can't forget that. And they do have this shared rhetorical framing of anti-imperialism, and being champions of the Global South or the Third World. But there are these huge ideological gaps that I think are really important. The Chinese are obviously atheist, but also, pragmatically authoritarian. The Iranians are theocratic and revolutionary. And that divergence does play out, I think today a bit, which suggests to me that the partnership has some limits. It's based on some shared values, but they don't always have shared interests. And I think that's sort of where we're moving. There's this strong tactical alignment, and it's born of isolation, and it's born of ambition, and it's born of opportunism. But Beijing is always very careful, I think, to keep it on China's terms. And has been, historically.

DUBOWITZ: So, I mean, obviously you're Pentagon, and even predating your tenure there, there was talk under the Obama administration about the strategic pivot to the Indo-Pacific. But obviously, as we start to think about pivoting out of the Middle East into the Indo-Pacific, China has been pivoting into the Middle East. And talk a little bit, Grant, about the way China sees Iran as a kind of key pillar of its pivot into the Middle East. Given Iran's size, its economy, its influence. Is it a key pillar of the Chinese influence strategy in the Middle East?

Iran and the Axis of Aggressors, Part I: China

September 3, 2025

Featuring Grant Rumley and Craig Singleton

Hosted by Mark Dubowitz

RUMLEY: Yeah, I think you can almost divide it into two phases. And I think everything, really before the Saudi, Iran, China facilitated agreement, represented perhaps a different calculation from Beijing. I tend to think they looked at Iran, historically, as this sort of geographically positioned power that had sort of a strategic place in the region. A cultural and religious sort of epicenter, a historical bulwark against perhaps some of their adversaries or competitors. I mean, a lot of the history also goes back to Chinese, Soviet Union ties, intentions, and rivalries, and wanting to bolster the Iranians because the Soviets had invaded Afghanistan. And so I think they tended to view Iran as sort of a useful foil, especially because it was the leading sort of anti-U.S. power and establishment in the region.

And then the other thing is, it's a straightforward calculation, as Craig was saying. They're an energy resource, and they're crucial. They can control stability and security of commerce coming out of the Gulf. And so, for China, it's very useful to not only have just a baseline relationship with Iran, but also one where they can sort of start to influence some of the events in the region.

I do think the center of gravity for China's interest in the region has shifted towards the Gulf, and away from Iran, in recent years. The agreement in 2023 is probably the icing on the cake that cements that, but if you look at not only sort of I think the size of China's investments, but the quality of the investments and the cooperation. It becomes quite clear to folks in and out of government that Saudi Arabia, the UAE, some of these Gulf partnerships, are where China really wants to invest its time and where I think they really see a viable future. And so I think, from Beijing's perspective, Iran is very useful. It sort of falls into this trilateral quad group with North Korea and Russia, and you can do port calls, and joint exercises, and you can have another country that has sort of joined your anti-Western coalition. But for a really sophisticated future, and one that is sort of advancing economies and benefiting both sides, I think China looks to the Gulf.

DUBOWITZ: And we're going to talk about that relationship with the Gulf, because obviously the Chinese played a important role, in this kind of bridging proposal in mediating between Iran and Saudi Arabia. I guess because they don't want to be in a position where they may have to choose between Tehran and Riyadh. But Craig, before we get to that, let's talk about Chinese strategy. Talk a little bit about BRI [Belt and Road Initiative], what is it, and how would Iran kind of fit into that vision of BRI?

SINGLETON: Yeah, no. I mean, I think we don't hear that much about BRI, anymore.

DUBOWITZ: And define it for our listeners. What is it?

SINGLETON: Yeah, Belt and Road Initiative. I mean, when it started, I think we're in the third iteration of Belt and Road, to be fair. When it started after the global financial crisis, the Chinese looked inward and had tremendous overcapacity domestically, and they didn't know what to do with it. They said, we're going to export it, but we're going to export it to countries that might need new bridges and roads, and projects. And we'll bring in Chinese workers, and we'll do it in the form of loans, which, many of which were quite predatory. And we'll build linkages throughout the world, and take advantage of this post-economic crisis moment, to champion a new vision for the world.

So the Chinese thinking, again, we have all of this extra concrete, and all of these extra workers, and we're maxing out domestically and reaching sort of saturation on a lot of these projects. But we still have to make money. Where are we going to go? So they start to pick off parts of the world that are geo-strategically important. That was phase one of Belt and Road. And I think a lot of those debts and bills have come due, and we've all seen that the lending was pretty predatory, and then the quality of the projects was frankly not very good.

DUBOWITZ: So the idea is to build, really, a global infrastructure. Transportation—



Iran and the Axis of Aggressors, Part I: China

September 3, 2025

Featuring Grant Rumley and Craig Singleton

Hosted by Mark Dubowitz

SINGLETON: Telecommunications.

DUBOWITZ: – telecommunications. Under, with–

RUMLEY: Ports.

DUBOWITZ: – Chinese money, Chinese workers, Chinese infrastructure.

SINGLETON: Absolutely.

DUBOWITZ: And really building a network that is competitive to the network that we built, the sort of rules-based order of U.S. power, and U.S. allies. Build a counter to that, and really do that across the world but also look at the Middle East as obviously a key strategic area for the Chinese Communist Party, and Iran as a pivotal player.

SINGLETON: Yeah, absolutely.

DUBOWITZ: What does Iran bring to a Chinese BRI in the Middle East? Why is China important?

SINGLETON: No, the Middle East is so important because they're all the vital choke points for global trade. The Chinese call them SLOCs, Sea Lanes Of Communication, and they said early on, we need to control these sea lanes of communication, so establish these arteries and these choke points and these port projects around the world, where we can create strategic leverage and dependencies with other countries.

Now, Iran hasn't been the primary recipient of Belt and Road in the same way that the Gulf States really have been, but that's primarily because the Chinese see a lot of risk when they look at Iran. What the Chinese see with Iran, where they could make gains, was in telecommunications access. Because they recognized, I think we all do, how geo-strategically important Iran is, and all of Iran's neighbors.

And so, they started to think about how they could scale some of those projects. But actually, it's interesting, because that was around the time of the Trump one administration, when you started to see max pressure, started to inject risk into Chinese calculus about Iranian markets and partnerships and growth opportunities, as Grant mentioned. And then sort of–

DUBOWITZ: And even buying Iranian oil.

SINGLETON: Exactly.

DUBOWITZ: It drove, Chinese purchases of Iranian oil–

SINGLETON: Into a cliff.

DUBOWITZ: –down to a couple of hundred thousand barrels.

SINGLETON: Yeah, we're back up to a million today, unfortunately, because we've been really lax on sanctions. But again, it was sort of an opportunity where through Washington, and through pretty ingenious measures, we could inject risk. And so Belt and Road got blunted in Iran and then really built up in places like the Emirates. But I think today what's so interesting is the second or maybe third iteration of Belt and Road has a lot less to do with infrastructure projects, because China's economy is stalling and they don't have money to pay for themselves, let alone build these big projects. The Chinese population has turned against Belt and Road.

Belt and Road is about governance now, and this is the sweet spot for the Iranians, right? It's this export of techno-authoritarianism and control and repression and Chinese standards. And the Chinese see Iran as a potential beachhead in the Middle East in a way that they couldn't be before, because they weren't going to make financial investments there,

Iran and the Axis of Aggressors, Part I: China

September 3, 2025

Featuring Grant Rumley and Craig Singleton

Hosted by Mark Dubowitz

but they can make these bigger investments today on governance and strategy and techno-authoritarianism and surveillance. And it's really become an interesting beachhead in the Middle East, whereas a lot of the other projects have fizzled.

DUBOWITZ: Okay.

RUMLEY: If I could just jump in on that point. I think especially as Craig was highlighting, I think China, if they were assessing their relationship with Iran in hindsight, I think they'd feel vindicated on two fronts, right? Now, the first and foremost was the Red Sea and the Houthis, right? Having this relationship with Iran meant that China could have a relationship indirectly with the Houthis and find some type of arrangement to get Chinese shipping through that strategic choke point there. When everyone else was reverting around the Cape of Good Hope, they had their own understanding.

The second is, after the 2023 agreement, the whole tenor and tone of the Arab states towards Iran has changed. It's in detente mode. They want to find an understanding. They're doing high-level meetings with Iranian counterparts. The position from the first Trump administration was very much almost ready for some type of action or ready for some type of confrontation, and was, I think, getting on board with the first Trump administration's approach to Iran and squeezing and pressure. The region now very much wants to find diplomatic arrangements, and for China that's right in the middle of their sweet spot.

SINGLETON: Yeah, totally. Maximize influence, but minimize entanglement.

RUMLEY: Yeah, risk.

DUBOWITZ: Well, Michael Ratney was on a previous episode. He was the former U.S. Ambassador to Saudi Arabia under Biden. And gave us some really interesting insights into the Chinese and Saudi calculations on that, call it a reconciliation deal that Beijing mediated between Saudi Arabia.

SINGLETON: Ostensively, we don't really know how deep they were in on that. That's what's so interesting about that agreement.

DUBOWITZ: How deep the Chinese were on it?

SINGLETON: Right. There were a lot of indications that they were just a venue, like a meeting venue. Like the Saudis just called them and said, "Can you host a meeting for us?"

RUMLEY: I sort of wonder if they stumbled into that. And no one would know this better than Michael, but you'll recall the tick tock was she visited Saudi Arabia in December of 2022. They released a number of statements. Some of the statements were a bit more pro-Gulf than pro-Iran, right? And they did upset some folks in Iran, especially with the status of the islands and whatnot. And then China sent one of Xi's deputies to Tehran a couple weeks later, and then the agreement was announced a couple weeks after that. I almost wonder if in the initial sway they found, the Chinese diplomats found, "Hey, there's a middle of the Venn diagram here that's a pretty easy lift, that we can get both sides to the table here. Why don't we push it?"

SINGLETON: And then in the middle of the Venn diagram wasn't us. And so all the regional actors are thinking about hedging opportunities against the Biden administration. So it was again, that opportunism at play, I think.

DUBOWITZ: And the question of not us, Craig, I mean, you've been looking at Chinese power, Chinese strategy, and U.S. efforts to counter the Chinese Communist Party globally. I mean, that deal itself in some respects would make sense. I mean, we don't have a relationship with Islamic Republic of Iran. China does. We have a relationship with Saudi Arabia, but so does China. And so for the Saudis made sense, they want to ensure that Iran stops firing through the Houthis

Iran and the Axis of Aggressors, Part I: China

September 3, 2025

Featuring Grant Rumley and Craig Singleton

Hosted by Mark Dubowitz

missiles and drones at their megaprojects and gigaprojects. So call up Beijing, convene this, get us together and try to mitigate the damage.

But is this China accidentally stumbling into this or does the Chinese government really have a strategy of dislodging us from the Middle East? Do they realistically think that they can chip away at our relationships with our Gulf partners, pull the Iranians into their orbit or into this axis? And at some point the U.S. president decides, we don't need CENTCOM anymore. We're devoting all these resources to INDOPACOM, and this is really our fight, this multi-generational fight against the Chinese in their backyard. But in the meantime, they slip under the tent literally, and are now in the Middle East and now the dominant power of the Middle East. Is that strategic forethought or is this the Chinese just being opportunistic and taking advantage of American missteps or demands from regional partners?

SINGLETON: I think it's both. It's an and question. It's like strategic opportunism. We see it in parts of South Asia too, where the trend lines have always been unidirectional, right? More Chinese influence, more Chinese access. The Chinese are thinking strategically about these regions trying to avoid entanglement, but they're still thinking about it. But I think we sometimes believe that the Chinese actually have some massive grand strategy that may or may not actually exist. And sometimes they're just able to capitalize on opportunities, frankly better than we are. And their brand that they've built of non-intervention and sovereignty-first plays incredibly well across this region and in lots of parts of the world, Africa, South Asia, even Southeast Asia. So they had enough money in the bank account. They had made enough deposits such that they can make withdrawals.

DUBOWITZ: But is that actually accurate? I mean, is sovereignty-first non-intervention brand, is that actually what China is doing across—

SINGLETON: No, not at all.

DUBOWITZ: —the opposite, right?

SINGLETON: Right, it's always the doublespeak. But the rhetorical branding from BRICS and the rhetorical branding from the Shanghai Cooperation Organization is rooted in making a world that feels safer for authoritarians, right? This is part of their mission statement. And by talking about non-interference and sovereignty-first, they can, I think, really win over not just populations, but elite capture in a lot of these countries. And for a long time, look, everything we say comes with strings. We're big on the lecture, not so much on the follow-through. And I think Belt and Road was a chance for them to actually put their literal money where their mouth is. In a lot of these places they did. You can see a dam, you can see a port.

DUBOWITZ: And you can pay off elites with big bribes.

SINGLETON: Of course, money moves hands, right? They understand how that works around the world. And so a lot of the time when people think about U.S. investments in different parts of the world, it's sometimes not so tangible. But for the Chinese, there's usually a physical manifestation of that connectivity. And I think over time, certainly over the last decade, again, the checks cleared, they had made enough deposits. Such that when some of these opportunities presented themselves and they perceived that Washington was either distracted or divided or lecturing them, they could hedge on this other power that for a lot of different reasons, a lot of countries in the world actually believe might be a rising power, buying into that Chinese discourse, and that we're a declining power. So it's better to start saddling up with Beijing and just play us off one another.

DUBOWITZ: Grant, what I find interesting about the GCC [Gulf Cooperation Council], I mean, particularly the Saudis, Emiratis, but others is, I mean, if I were to actually look at what the Chinese are doing or have done historically vis-a-vis

Iran and the Axis of Aggressors, Part I: China

September 3, 2025

Featuring Grant Rumley and Craig Singleton

Hosted by Mark Dubowitz

Iran, I mean, as you mentioned, it's a revolutionary regime in Tehran, it's an expansionist regime. It's caused absolute chaos and bloodshed throughout the region, right? It's a direct threat. I mean, they're actively and directly threatening and trying to undermine the kingdoms in Saudi Arabia and the UAE and Bahrain in particular. And the Chinese have provided missile technology, drone technology, nuclear technology to the Iranians that has been used to threaten GCC countries. It's amazing to me that with all of that support for the Islamic Republic of Iran from the Chinese Communist Party, they've still managed to actually play this game the way Craig has described, in the Middle East. What accounts for that?

RUMLEY: Well, that is a question that puzzles many folks in U.S. government who have tried repeatedly to message our partners in the region and around the world of the perils of cooperating closely with China. And that China's interest is first and foremost self-driven. The Houthi example that we were just talking about is a prime example of what China wants globally and in the region. They want to secure their own interests first and foremost. I think from China's standpoint, what they're able to say is, "Yes, we provided ballistic missile technology to Iran. We also provided that to you in the Gulf. We provided that to some Gulf countries as well. We're selling air defense systems. We'll sell the J-10 to whoever wants to buy it. We won't put strings on any of our sales. Sure, we're buying oil from Iran and supporting the Iranian economy, but we're also buying from Saudi Arabia and the UAE, and we're buying from Iraq as well."

And so I think that argument was a bit of a tough sell in various crowds before the 2023 agreement. Everything after that, everything after Ukraine, I think the precedent there for China releasing its global security initiative, its new framework for international cooperation, it has a proof of concept that it's able to point to. It's able to say that our concept of win-win cooperation of everyone getting along to us means we're engaging in transactions, and these transactions don't have a lot of strings attached. We're trying to benefit each other, and we don't see the hypocrisy of selling military kit to Iraq – or to Iran and to Arab Gulf states, because everyone is working in this security framework.

And by the way, I mean, this goes back decades. They sold the same fighter jets to Iran and Iraq during the Iran-Iraq war. So I think it's a Chinese practice that I don't think the Arab Gulf states or anyone else who engages deeply with China, I don't think they have any illusions about. I think it's a set practice. They sort of understand what they're getting. The allure of cooperating with China is you can typically get stuff cheaper and without strings, and usually it's arriving faster. You know it's probably also going to your competitors, are going to people you don't want to see it go to, but that is the cost of doing business. And so, yeah, I think the real rub for us in the policymaking community is how do you make that message effective? How do you demonstrate in tangible ways that this close cooperation actually undercuts your own interest?

DUBOWITZ: You both mentioned this 2023 agreement. Can you say a little bit more about it?

RUMLEY: Well, yeah. I mean, it's just simply that there is some type of detente between Iran and Saudi Arabia. And I think it's notable in that for two reasons. One is that it defied the tone of the previous few years, the tensions that had come after the Abqaiq attack, after the hostilities with all the proxies in the region, the residual effects of max pressure. The whole region, I think, was, sort of, eventually on board with the first Trump administration's policy towards Iran.

DUBOWITZ: And by the way, just to clarify for our listeners, we had a whole episode on Saudi Arabia, but in case you didn't listen to it, I mean, when you're talking about Abqaiq, I think that was a seminal moment for the Saudis, right? Iranians attack the Abqaiq Aramco facility, they take whatever it was, 10-20% of Saudi oil offline. And Trump administration doesn't respond.

RUMLEY: Exactly. And that's the key I think, of why the attitude and the tenor changed in the region.

DUBOWITZ: We better find ourselves another great power.

RUMLEY: Exactly.



Iran and the Axis of Aggressors, Part I: China

September 3, 2025

Featuring Grant Rumley and Craig Singleton

Hosted by Mark Dubowitz

DUBOWITZ: That has our back, that has relationships with Tehran, and can prevent another episode where we fired our strategic and economic assets.

RUMLEY: And it was bipartisan too, right? Abqaiq happened during the Trump administration. There was the 2021 attack on the UAE during the Biden administration. There was enough, I think, disillusionment from the Arab Gulf states in terms of the divide between the rhetoric and the action of the US towards Iran. And that led them, I think, to come to this realization that they wanted to find some type of back channel and lower tensions with Iran in the region, and China was there to help facilitate it.

DUBOWITZ: So a great frustration of mine in Washington, there've been many, is right after the United States killed Qasem Soleimani under Trump one, I called up the White House and I said, "It's four months since the Abqaiq attack. So when you explaining the reasons why you killed Soleimani, there are many good reasons. Can you add to reason number five or six or seven that this is a response to the Iranian attack on Saudi Aramco? Because it's four months later, revenge is a dish best serve cold. It took time to find Soleimani, get the intel, locate him in Baghdad and take him out, but we did it. And one of the reasons we did it is because Saudi Arabia is attacking our important – sorry, Iran is attacking our important Saudi ally". And they said, "That's a great idea. We'll do that, run up the chain, talk to the lawyers."

Well, they came back and said, "For some reason the lawyers refused to allow us to say this." I mean, there's those hinge moments where you think had we said that and messaged that, we could have provided assurances to the Saudis and the Emiratis and others that actually we do indeed have their back and they don't need to be turning to the Chinese Communist Party, who by the way, would not be there for them the way that we were. But needless to say in another example, why there's too many lawyers in this town, and they usually screw up foreign policy.

SINGLETON: No, they do. I think Grant mentions a great point though. There's this divergence for the Chinese between rhetoric and reach, and this is an example where there was a perversion of that system, right? So the Chinese sat back and they said, "We talk a lot about being a Middle Eastern power, but it's clear that the US still is, like, the major power center here." This 2023 deal is a chance for them to flip the script, right? Not only are we powerful, but we're hosting. There's the rhetoric and reach come together in way that prior to this moment was probably quickly exposed.

But I actually think it was sort of fleeting when hostilities erupted in Gaza. No one was really calling Beijing to fix things. It's the same thing with Ukraine, right? There's this divergence between great power rhetoric and what they can actually have reach on the ground that we've spent a lot of time, money, capital, blood, and treasure building up. And so no countries in the region were really calling Beijing to come mediate this thing. They talked a lot about it, but nothing ever came of it. And so I think, again, countries in the region are constantly sitting there, looking and hedging like a tennis match between the two countries, the US and China. And sometimes they score a point, sometimes we score a point. But there is still this divergence on China that we shouldn't forget that they actually aren't peacemakers. And they haven't been able to do it in Ukraine and they certainly haven't been able to bring long-lasting peace to the Middle East.

DUBOWITZ: Yeah. And why, it would be, I think, geopolitical malpractice for the United States to withdraw from the Middle East. And given, as you said, the decades of blood and treasure we've invested in in building up that leverage and influence, to surrender it to the Chinese Communist Party and arguably the second most important strategic area of responsibility—

SINGLETON: Theater.

DUBOWITZ: —and theater in the world would certainly do that. Let me talk, Craig, a little bit about Chinese purchases of Iranian oil, because it's become a flash point in recent years. So maximum pressure under the first Trump administration drove Iranian oil sales down to a couple hundred thousand barrels from 2.5 million barrels a day. And now, as you say, it's

September 3, 2025

Featuring Grant Rumley and Craig Singleton

Hosted by Mark Dubowitz

popped back up. I think the last number I saw was about 1.5 million, much of which has been bought by China. So they're buying a lot of Iranian oil off the books. Tell us how is that happening and what leverage do we have to disrupt it?

SINGLETON: Yeah. I mean, so Iran treats China like a lifeline, because it is. But the Chinese often think about Iran like a liability. So I think it's really important. Obviously, for China, Iran serves as a pack of energy supply. I think as Grant mentioned, it's not a growth market for the Chinese. And Chinese trade with Iran is obviously dwarfed

SINGLETON: By everything that you see, even with the US, let alone the Gulf in Europe, and even Israel for God's sake. But you're right, Beijing buys around a million to a million-five barrels a day, often at a very steep discount though, right? So with that, Tehran is keeping them afloat. It's cheap energy for China, as Grant mentioned, which is right. But it's also cheap energy outside of US and OPEC [Organization of the Petroleum Exporting Countries] controlled channels, which is I think the real silver lining for Beijing here, and for, frankly, Iran. But when we talk about real investment, I think it's important to remember that Beijing's pretty hesitant. There was a \$400 billion deal, right?

RUMLEY: Right, the 2021 agreement.

SINGLETON: Yeah. Not a lot came from that, and not a lot materialized and certainly not in really meaningful ways. And so again, that's the rhetoric reach sort of debate in real life. Why they're able to do it though, it's because we haven't been very thoughtful about sanctions enforcement. For the Chinese, they're thinking constantly about their energy needs. Of course, China is dependent on external actors for power, but as China's economy slows and as they explore other forms of energy, they're going to become less and less dependent on the Middle East.

And so this is going to be a shifting and evolving dynamic that I think we're all going to need to watch because will countries in the region pay China the same lip service and do their bidding if China isn't buying their oil? And it'll be interesting in the Iranian context because China doesn't want Iran to become developed. That's not like a goal of theirs. They want them to be dependent. The goal is not partnership, it's patronage. And I think that's how the Chinese are seeing the region long term.

And the question is whether these other non-oil arrangements are going to provide a platform and a vehicle for this relationship to continue to grow and thrive, or whether we actually have an opportunity, I would say, to forcefully cut it off now.

DUBOWITZ: And we've done it twice. I mean, we did it under the Obama administration. We did it under the Trump administration. We sanctioned a key Chinese bank. I mean, kill the chicken to scare the monkeys. We did that.

SINGLETON: And it worked right?

DUBOWITZ: And it worked. We've gone after Chinese refineries, these teapot refineries, and so there is a supply chain there that if we were serious, as Craig said, about sanctions enforcement, I think we could once more, again, change the calculus of Beijing, and particularly if Beijing was forced to choose. If the Saudis, again, as they've done in two occasions, many occasions actually, turned on the taps, increased the output of Saudi oil and gave Beijing an alternative to Iranian oil, we could start to put pressure on them.

I want to shift from oil to military and security cooperation. And Grant, you were at the Pentagon. You've seen this. Craig, you've been seeing this from your perch at State and at FDD. How deep is that military cooperation? I get a sense from you gentlemen that the economic cooperation is not quite what it's advertised. This sort of massive \$400 billion deal between Beijing and Tehran is probably a few zeros attached to that today. But military insecurity, is that deep? Is it serious? And how does it redound to the benefits of the two actors?



Iran and the Axis of Aggressors, Part I: China

September 3, 2025

Featuring Grant Rumley and Craig Singleton

Hosted by Mark Dubowitz

RUMLEY: I don't think it's overly deep. I think China has a small but continuous military presence in the Middle East. They have their only overseas bases in Djibouti. They have this naval escort task force that has been deploying to the region since 2008, 2009. In terms of military cooperation with Iran, I think there's sort of the operational and training you'll see in general port calls. Or exercises sometimes with Russian forces as well, between this Chinese naval task force and counterparts in Iran happening in the Gulf there.

The other lens is in equipment and kit providing and support; that has not been, you know, in the past, China was a more traditional seller of conventional weaponry to Iran. Even after the arms embargo, I don't think China has really rushed into selling traditional.

DUBOWITZ: Why not, by the way? It kind of puzzles me. I mean, is it a question of the Iranians don't have the money to buy it? Is it a question of the Chinese respecting a UN resolution on military sales? I mean, I find that hard to believe. By the way that UN military embargo is gone so the Chinese certainly have the ability now—

RUMLEY: You certainly could, right?

DUBOWITZ: —to sell both military equipment and missiles to Iran. Why haven't they stepped into the void and massively increase the size of the Iranian military?

RUMLEY: I think if you're China, you've gotten your defense industrial base, and Craig knows this way better than I do, but you've gotten your defense industrial base to a point where it's self-sufficient or largely self-sufficient. It, in the past, was so reliant on Russian technology and other technology. They found a way to develop its own capabilities that you really weren't a big player in the export market. I mean, they really reached a high after the Iran-Iraq war because selling to both sides during a war was lucrative.

But everything kind of went into a lull until about the late 2000s, 2010s, when they started, I think more actively putting material out on the market and trying to pitch certain platforms. Their fighter jets are now really coming online. Their air defense systems are really gaining some traction. Most notably, and Brad Bowman here at FDD has done a ton of great work on this, their armed drones have been wildly popular in the Middle East and in Africa.

I think if you're in this moment, you're seeing markets expand around the world. Defense expenditures are up, the rate of equipment is turning over much faster. Countries around the world are trying to buy more, and you want to navigate this in a way where the reputation on your weaponry is improving, right? I mean, the big connotation with China's weaponry in the past was that it's cheap, but it's bad, right?

The Iraqis bought 20 CH-4s and could only keep a couple of them in the air during the D-ISIS campaign. The Jordanians got rid of theirs pretty quickly. It's not interoperable with existing Western equipment; all these sort of obstacles to it. So if you're China, you've finally gotten your defense industrial base to a place where you're building, really, I think more advanced weaponry.

The market is there, the demand signal is there. You might want to just sell to safer clients, to places where perhaps they're not going to operationalize it so quickly. Maybe it'll just be on display. Maybe it'll look nice. Maybe it'll improve the prestige. If you sell it to the Iranians, there's a good chance it's either going to be used directly by the Iranians—

DUBOWITZ: Or the Israelis are going to blow it up.

RUMLEY: Exactly. Or it's going to go to a proxy and the proxy is going to use it in a way that doesn't show off the capability.

Iran and the Axis of Aggressors, Part I: China

September 3, 2025

Featuring Grant Rumley and Craig Singleton

Hosted by Mark Dubowitz

DUBOWITZ: I mean, the thing that I'm watching is Israeli strikes in April, but particularly in October, taking out the Russian strategic air defenses and reducing ballistic missile production capability by something in the neighborhood of 90%.

But there have been now reports the Chinese are moving to replenish both the air defenses as well as some of the key equipment—

RUMLEY: The propellant, yeah.

DUBOWITZ: —for the propellant, for solid fuel missiles. And there was a big *Wall Street Journal* story just a few days ago about this; thousands of tons of this precursor material for something like 800 ballistic missiles that the Iranians want to build to replenish their inventories. So they seem to be stepping into the void, actually replacing the Russians who may not have the capabilities today to send more S-300s to Tehran, but stepping in and helping rebuild Iranian capabilities. So is that where—

RUMLEY: I think so.

DUBOWITZ: —we're going to be heading?

RUMLEY: Yeah. I think so.

DUBOWITZ: Is that a more risky move by Beijing and how does that play out, A, with the Israelis, the Americans, but also they're close Gulf allies?

RUMLEY: Yeah, I think it's a risk averse move in a way. I mean, you can give propellant for ballistic missiles, but that's not really an advanced technology. If you do give an air defense system akin to the S-300, which I think I would probably be skeptical of. The argument in Beijing against that would be why would we give the Israelis, and by extension the Americans, a free trial run at testing our air defense systems? Because it is likely at some point that the Israelis may look to test the capabilities.

DUBOWITZ: Yeah, it's bad for sales if it ends up failing and getting destroyed.

RUMLEY: Exactly. It's not only bad for sales, it's bad for your planning around Taiwan as well. Why would you want to give Western militaries sort of the TTPs [Tactics, Techniques, and Procedures] on how to defeat your own air defenses? So I think from their standpoint, and Craig, correct me if I'm wrong, I think they're, what's the minimum threshold I can answer mail and keep the Iranians happy, but not overextend myself and increase risk to my own technologies, to my own prestige, and to the second and third order effects that would come with that?

SINGLETON: Yeah, it's low stakes, right?

RUMLEY: Yeah.

SINGLETON: And they haven't encountered our red line on most anything, the Chinese. So again, whether Beijing approved or knew about all these deals, yet they know now, but the question will be is do we do anything in response to it? What I think the Chinese are constantly testing and probing is whether we have the political fortitude to respond and do something forceful on this. And if we don't, I think the signal to Beijing must be like, okay, well, we know that's in the okay box for now. What else on our sell sheet can we sell when the opportunity arises?

And that's that opportunism, right? They've built up this massive domestic defense industrial base that services itself, but also some of its partners. We just got a taste of how good Chinese technology is in the India-Pakistan conflict. The Chinese jets performed very admirably. And I have no doubt that the Pakistanis are sharing tons of technical data with the Chinese specifically for a Taiwan contingency scenario.

Iran and the Axis of Aggressors, Part I: China

September 3, 2025

Featuring Grant Rumley and Craig Singleton

Hosted by Mark Dubowitz

But in the case of Iran, they can say, well, let's just see what happens. Will the Trump administration, will the White House do anything if we do provide these things? And then there's a new baseline, and maybe from there, there is other types of growth, but the high-tech product I suspect won't be there. And one of the other key reasons, of course, is trust. The Chinese are careful. They're asking themselves, "Hey, what are we going to get out of this? What are we going to learn from the Iranians?" Probably not much.

It's why their partnerships with Russia are so much stronger because they get interoperability training, they get experience, they're getting access to the Arctic. There's technology at the low end and the high end. It's a much more useful partnership to them. But I think increasingly they look at the Iranians and they're like, "I just see a lot of risk here." And I think Grant outlined a number of reasons that are fair.

But for the Chinese, they would say, we can make our gains there in other ways. We can increase intelligence collaboration. We can increase the telecommunications presence. We can export new technologies and trial them in Iran, which is what they're doing a lot of in the surveillance space.

DUBOWITZ: Yeah, I want to talk to you about that, Craig, because it's

SINGLETON: In the AI space.

DUBOWITZ: Yeah, that's a real theme of this podcast is really talking about the regime apparatus inside the Islamic Republic and the sort of high-tech surveillance authoritarianism model that Beijing has exported. Beijing hasn't just exported the idea, they've actually exported specific technologies to Islamic Republic. Do you want to talk a little bit about that?

SINGLETON: Yeah, no, sure. It's China. Inc. I mean China isn't just helping them survive sanctions, right? China is helping the Iranians suppress their own people. China is by far and away the biggest enabler of Iran surveillance state. So they're selling facial recognition cameras and AI, and even torture devices that allow the Iranians to suppress and monitor their own people.

A key player is a company called Tiandy Technologies. We did a big report about them a few years ago. They sell facial recognition cameras that mainline into a country's registration database of everyone in their country. And in near real time, they can scan your face at a protest and align it with your identity cards, like your birth certificate, passport, and then come knock on your door. And that's exactly what happened in the 2023 protests in Iran.

So all of these technologies were sold directly to the IRGC [Islamic Revolutionary Guard Corps], mainlined into these command centers in Tehran. We had these female-led protests, and two, three, four, or five days later, women were getting knocks on the door from the Basij saying, "We got you. We know you were at that protest." They were like, "How do you know?"

DUBOWITZ: Wow. So facial recognition to the Iranian national ID number?

SINGLETON: The merging of the two, which is what the Chinese do domestically. And so that's a really appealing blueprint for the Iranians. Again, remember the Chinese provided them with a lot of the telco backbone through Huawei. And now you can put CCTV cameras around the whole country that are all, again, mainlined into command centers. And then you can use that technology to track and monitor and suppress dissent.

And the challenge I can think for the United States, frankly, is you can buy Tiandy cameras on Amazon today. You can buy them and have them delivered in Washington. They're cheap, right? They're inexpensive. That's why Iran was able to buy them. But if we're not going to start to block these Chinese technologies and AI from our own networks and markets, you



Iran and the Axis of Aggressors, Part I: China

September 3, 2025

Featuring Grant Rumley and Craig Singleton

Hosted by Mark Dubowitz

could find these cameras in Tehran just as easily in Texas. That's where we're sort of heading here, and I think it's just a key area of focus for us here.

DUBOWITZ: And they've used this in Xinjiang, correct—

SINGLETON: Correct.

DUBOWITZ: —in these internship camps?

SINGLETON: It's like where they pilot and test everything domestically, everything that they build and create. So they did it against the Uyghurs. Again, they married CCTV cameras with AI to China's national registry. And then they would start to visually identify the characteristics that make someone look Uyghur, just like Mengele sort of did with what does a Jew look like in Germany? And the AI would scan faces on the street tag people, monitor them to their homes, and then the Chinese secret police would go knock on their doors and say, "You're coming with us to a 'reeducation camp,'" which is really just a modern concentration camp.

But they did it at scale using AI in China, and then they exported this to all these other countries. And Iran is the test bed for the Middle East, especially they have to master new language. They have to do training protocols for the Iranian security services. They have to get access to their full stack of their communications infrastructure. So it becomes a beta test environment for them, and it's pretty alarming stuff.

DUBOWITZ: Well, it is. So hypocrisy knows no boundaries, but it is amazing to me that the Chinese Communist Party is locking up Uyghur Muslims in concentration camps in Xinjiang, and yet still has this strategic partnership with the Islamic Republic of Iran, which seems to have no concern about their fellow Muslims in Western China.

SINGLETON: No. None of the GCC states do. No—

RUMLEY: It sticks to their—

DUBOWITZ: That's fair as well. You're right.

SINGLETON: No one seems to say anything, right? Money speaks.

DUBOWITZ: Right, right. I want to pivot back because it's fascinating to me. I remember Grant, under the Trump administration, one, is U.S. officials going to Israel and reading the Israelis the riot act about their relationships with China. It was quite successful. I mean, at that time there, Chinese companies were very involved in public tenders and in building out Israeli infrastructure. There's been a lot of Chinese money sloshing around in the Israeli venture capital and high-tech community.

But I think the Israelis got the message, right? There's now no longer any Chinese companies involved in public infrastructure. If you are bidding and a tender and there's any Chinese involvement, the message is you will lose as tender. So the Chinese have stepped away.

I've seen the figures on venture capital investment. Most of the Chinese investors also were pushed out of the VC market. I mean, I'm sure there's still some tech companies doing naughty things, and there's still problems with academia like there is in the United States and all over the world. But I think the Israelis kind of got the message loud and clear.

Are Sunni partners, did they get the message loud and clear? I'm sure we've been sending out the same kinds of signals, but the Saudis, the Emiratis, the Bahrainis, the Egyptians and others, they seem to be hedging.

RUMLEY: I think so.

Iran and the Axis of Aggressors, Part I: China

September 3, 2025

Featuring Grant Rumley and Craig Singleton

Hosted by Mark Dubowitz

DUBOWITZ: And maybe more successfully than the Israelis were able to hedge between the United States and China.

RUMLEY: Well, in the case of Israel, my first job in OSD [Office of the Secretary of Defense] was working on Israel. And I was there for the Haifa Bay port announcement with the Shanghai International Ports Group and the 25-year deal and everything. Look, even with a close US-Israel relationship, you can still have turbulence. And at a certain point, as we encountered in government, there's a limit to how much the partner wants to hear from the US. And sometimes, especially in this moment with China, we're almost blessed with our adversary, and it was really, to my mind, I think China's response to October 7th that finally flipped the switch within Israel that, "Okay, this is not a country that has our best interest at heart. This is not a country that is even sympathetic to our side here." The Chinese ambassador wrote a *Jerusalem Post* op-ed that didn't even acknowledge October 7th. The Chinese rhetoric has been so, I think, one-sided—

DUBOWITZ: Yeah, and Chinese social media behind the Great Firewall has been a massive increase in not only anti-Israel, but anti-Semitic activity, which I think has shocked a lot of Israelis and Jews who thought of China as a fairly philosemitic country. Well, guess what?

RUMLEY: Yeah, and that has not happened with a lot of the Arab states in the region. They've been feeling the pressure from the US, they've been feeling us sort of establish our own red lines and say, "You can't do this," or "can't do that with China," but it ultimately, I think, takes a combination of U.S. messaging, third-party messaging – it's one thing to hear something from the State Department person, "Oh, don't do this with China." It's another thing to hear it from Nvidia or Apple or an American company or another country in the region saying, "Hey, guess what? This relationship with China is not within your own best interest."

But then it also, I think, requires, unfortunately at times, sort of first-hand experience with some of the predatory practices. The Jordanians have gone through this with the Attarat shale oil extraction facility that was financed by China, brought in Chinese workers, and has really not lived up to the promises for Jordan, and so they're in a whole series of arbitration with them over that. I think the Gulf states in particular for many years, they looked to the US for their security solutions and they looked to China for some of their economic solutions. And their economic indicators, as Craig pointed out earlier, shows to them that China is going to be a leading economic power down the road, and you should have some type of relationship and partnership with them because you want to be in on that opportunity long-term.

The problem for us in U.S. government is that so many forms of this cooperation with China bleeds into the security, the technological realms, they bleed into the competition. It's not like the Cold War competition where country X could buy a Soviet tank and an American fighter jet and nary the twain shall meet. It's very easy for you to put the tanks over there and the jets there and, okay, it's a competition, but it's not risking, necessarily, proprietary US information. Now in this moment when you have Huawei and ZTE in your government networks and you want to buy an advanced American military platform, suddenly that's a risk, that's a concern, and that concern has been bipartisan, especially in the Middle East. It emerged in first Trump administration. It was there in the Biden administration. It's there, I think, on both sides of the aisle that ultimately, if the competition with China is the priority, then exporting ships, selling the F-35, sending these advanced technologies to countries, we got to have certain safeguards in place.

DUBOWITZ: Oh, right. With the Turks, so they're the one buying Russian air defenses and then asking to be in the F-35 program—

RUMLEY: Can't do it.

DUBOWITZ: Can't do it. I hope the Trump administration sticks to that. I worry they won't.



Iran and the Axis of Aggressors, Part I: China

September 3, 2025

Featuring Grant Rumley and Craig Singleton

Hosted by Mark Dubowitz

SINGLETON: Yeah, I just want to add to that briefly because I think we're reaching this moment where it is harder to hedge, and I think the Israelis are not quite ready yet for what's going to be asked of them. Everyone sort of assumes, even our closest European allies, that they have done enough. Our asks are going to continue to multiply, though, I think for all the reasons that Grant outlined, and increasingly we're going to go to these countries, including Israel, and say, "We don't have it perfect here, but we're certainly doing more than you, so you're going to have to match and mirror our export controls if you want to have access to our technology. You're going to increasingly need to think about outbound investment screening," which we have, "into core Chinese sectors that we deem a national security risk." Israel doesn't have anything like this. You're going to have to have a formalized CFIUS [Committee on Foreign Investment in the United States] project that's transparent and routinized and that works, and it can't be informal anymore, which is sort of how it started in Israel. So there's going to be more and more asks. If you want our top-end chips, you better get on board. You better cut off JVs.

DUBOWITZ: I'm willing to bet with you that of all our allies that we're having to quote 'the riot act to' on Chinese relationships and technology and military and all the rest of that, I think we're going to find the Israelis probably more open to this for all the obvious reasons why than maybe many of our European allies and Gulf allies.

But this is a good segue to an issue I want to ask both of you about, which is certainly germane to the Israelis, but to the Americans and perhaps to the Chinese, and that is the current nuclear talks that are going on. China has been a proliferator of nuclear technology. China has backstopped Iran throughout Iran's nuclear weapons development. China was, along with Russia, the main advocate for Iran during the 2015 nuclear talks of the United States and with the Europeans. Where do you see China's role today as the United States tries to strip Iran of its nuclear weapons capability? Is it going to play any kind of positive role, or are we once again where we've been for so many years, where Beijing is helping Tehran? Does Xi want to see Khamenei with a nuclear weapon?

RUMLEY: I'd defer to Craig here. I don't necessarily think they want to see that happen. Especially, I think, in their view, that increases the chances for regional instability in the region. And if you're China, your top priority in the Middle East is stability and overall security because your top priority is economic in nature. And if anything were to interfere with the free flow of commerce, that directly goes against your interest. I don't think they'll be—

DUBOWITZ: Do you want a nuclear-armed Middle East?

RUMLEY: I don't think so.

DUBOWITZ: Because if Iran goes, Saudi will go, Turkey will go, Algeria, UAE maybe. This is Egypt — at the end of the day, if you're Beijing and you want a, quote, 'stable Middle East' with a free flow of oil, where the risk premium on oil is as low as possible so you're not paying significant premiums, I can't imagine a nuclear-armed Middle East is in Beijing's interest, and yet you still see the Chinese helping Tehran with technology and with political support in their pursuit of nuclear weapons. It has always puzzled me why the Chinese have not been more helpful to us. And maybe, Craig, is that because at the end of the day, more important than stopping an Iranian nuclear weapon—

SINGLETON: Stymieing us.

DUBOWITZ: —is stymieing us?

SINGLETON: No, I don't get the sense that the Chinese are major factors in these discussions. Again, it's like observers. It's the rhetoric and reach. They were at the table for JCPOA [Joint Comprehensive Plan of Action], but were they really factors? I think they were looking out for their own domestic nuclear industry, which is expanding at a massive clip. And I

Iran and the Axis of Aggressors, Part I: China

September 3, 2025

Featuring Grant Rumley and Craig Singleton

Hosted by Mark Dubowitz

don't think the Chinese would want a nuclear Iran, but they also in this very moment don't see that as a near-term risk in the same way that I think we do in Washington.

And so then there's this divergence again; where are they primarily focusing their effort? On themselves. China's facing massive domestic challenges, economic, political; their near abroad is increasingly contested; they're watching Russia not win in Ukraine, but certainly not lose. So they're watching and monitoring all these movements, and then I think they're sort of trying to figure out and wade their way through the river stone by stone to try to figure out, "Well, what role do we have to play in this? Is there a way for us to have a win-win outcome? Do we need to inject and potentially lose political capital on a deal that blows up, or do we try to swoop in maybe at the end and claim some credit for some lasting deal that does work, even if it's US-led?" And I think that that's sort of, again their framework for the region as they sit there and they realize, "Yeah, we're a big factor, but the US is still like the big dog in this fight."

The question will be whether this administration sees this through – how they see this through to the end, and whether, again, I don't think the Chinese really jump on the grenade for the Iranians on much here, but they're going to be looking out for their own opportunities, especially if a deal is one that allows civilian nuclear power generation, because then the Chinese say, "Now we have a new market."

RUMLEY: First in line.

DUBOWITZ: Yeah, interesting.

SINGLETON: Right? "We'll be right there." And then I think we all understand the inherent risks of that sort of enrichment capacity or civilian nuclear framework and architecture in Iran. We all know where that goes, but from the Chinese perspective, it's a business deal. And right now, Chinese nuclear technology is top-notch and maybe they see it as a business venture.

DUBOWITZ: Okay, so final question. I have a theory to share with you, and I'd like both of you to respond to this. So we at FDD call this the Axis of Aggressors. It's China, Iran, it's Russia, North Korea. I think the Europeans, or the Brits at least, call it CRINK–

SINGLETON: CRINK, yeah, that's right.

DUBOWITZ: China, Russia, Iran, North Korea, CRINK, which is a great British acronym. So my theory of the case is that if you look at the Axis of Aggressors, you've got China, which is a multi-generational struggle for the United States against a nuclear-armed great power; you've got Russia, not a great power, but a significant power, nuclear-armed; Putin's willing to throw hundreds of thousands of Russians in order to wear down the Ukrainians and is setting his sights on Eastern Europe and undermining NATO; it's a serious adversary; you've got North Korea, where Kim has got nuclear-armed ICBMs [Intercontinental Ballistic Missiles], huge conventional weaponry, could wipe out Seoul in a week and has significantly limited our military options, ours and the South Koreans.

So if you look at those three members of the Axis of Aggressors, it seems to me the weakest member of the Axis of Aggressors is Iran. Thanks to Israeli military activity, air defenses, boosting missile production, the axis of resistance, or we call it the axis of misery on this show, has been severely degraded by Israel, particularly Hezbollah and Hamas, and huge economic pressure on the regime. Millions of Iranians have been on the streets yelling, "Death to the dictator." 80% of the population hates the regime. It seems to me that we have a real opportunity to undermine Chinese influence in this great power competition by going after one of their closest allies. Now, whether that is a partner or a pawn or a lever, I don't know how you would describe Iran for China, but at the end of the day, weakening Iran, undermining Iran certainly



Iran and the Axis of Aggressors, Part I: China

September 3, 2025

Featuring Grant Rumley and Craig Singleton

Hosted by Mark Dubowitz

would redound our benefit in our competition with China in the Middle East. Do you two share that thesis? What am I getting wrong? What am I overstating or understating here?

RUMLEY: I think weakening one weakens the others because of the interconnected nature of the relationship right now. I would be candid, I don't think we've seen the four of them working in harmony on one set objective yet. I think we've seen most often bilateral and then trilateral, but we haven't seen all of them working together yet. But the interconnectivity of that relationship is very clear, North Korean soldiers in Ukraine fighting for Russia. Chinese technology and support basically has kept Russia in the fight.

DUBOWITZ: Iranian drones.

RUMLEY: Iranian drones—

DUBOWITZ: Targeting Ukrainians, right.

RUMLEY: – and missile technology. Exactly, right? So it's all connected there. So if you can weaken one, you can weaken the other. The risks there for other countries dealing with this sort of nexus is clear. They don't have the same type of export controls that the US and Western countries have in place. And so if the Russians get their hands on Western military technology, the North Koreans, the Chinese, the Iranians are likely going to have access to that. The repercussions, the second and third order effects for the Middle East, for Israel, for our partners in the region with the proliferation of that type of technology and weaponry is clear and evident. And so to my mind, it's always been a bit of a no-brainer; anything you can do to weaken Russia's position in Ukraine or Iran's position in the Middle East has benefit for the US and its competition with China. And so, yeah, I would be a full-throated advocate of anything you could do to sort of roll back Iran's position in the region.

DUBOWITZ: Craig, any final words?

SINGLETON: Yeah, I'm not going to use the word CRINK because I don't like it, but they are a band of misfits, and I would probably argue that you're right, Iran is the weak link, and of course the only one without a nuclear weapon that we know of, which is a key factor here. These are not relationships that are rooted in trust, right? They're pretty transactional, and I think that gives us a lot of flexibility. And they also haven't really been tested, frankly. So I think Iran is the perfect test case to say, "What happens when you bring all the pressure to bear? Do the other parts of this axis of authoritarians or aggressors rally around them, the weak flock, the weak sheep? Are they willing to put their own safety and security on the line?" And I'm willing to call that bluff because I don't think the Chinese have ever demonstrated a willingness to put skin in the game for anybody else. They'll go right up to the line and get chalk on their cleats, and they're doing it in Russia primarily because we haven't done anything against Chinese entities providing support to Russia's war machine.

If we did have a pretty serious shot across the bow, I think that would be the real test to determine whether the Chinese are serious about this aligned world order or whether we're calling their bluff, and when that happens and just one member of CRINK or whatever we want to call them is seen as, or it's perceived that China's not going to come to their aid or the Russians are distracted, then you can break that trust even more. And I think that's where we have real opportunity and we probably haven't been thinking about it enough, frankly, as a country. But I think Iran's sort of the test case, like what happens if you start to really use all of your levers of power there? Do the other bad guys step in to defend? And my guess is they don't.

DUBOWITZ: And if they don't, then that sends a message to other bad guys: the United States is here.

SINGLETON: Right. Can't trust these guys.



Iran and the Axis of Aggressors, Part I: China

September 3, 2025

Featuring Grant Rumley and Craig Singleton

Hosted by Mark Dubowitz

DUBOWITZ: Don't trust—

SINGLETON: China.

DUBOWITZ: —the Chinese Communist Party. United States is here. It also sends a message to our allies that we actually have their back, and per our discussion on the Saudis and Abqaiq and the fact that we didn't come to their defense back then, here's an opportunity where we've undermined, we've weakened, we've constrained Islamic Republic of Iran. That's good for our allies in the Gulf, it's good for our relationship with Israel, but it also sends a message to the Taiwanese, to the Ukrainians, and to other beleaguered democracies and allies that the United States is serious. Just seems to me that if you're going to choose one member of the Axis of Aggressors, that one seems to be the weakest right now, and this is the time to double down on the pressure or not concede at the negotiating table in Iranian nuclear weapons program.

Gentlemen, wonderful to have you. I want to have you both back on because there's going to be a lot more to talk about in this China-Iran relationship. I feel like it's not talked about enough. There's mentions of it in Washington, but I don't think we go deep enough on the China-Iran relationship and look for opportunities to exploit the fractures and the fissures. And really by undermining Iran, we can actually do damage to the Chinese Communist Party, which is a number one strategic priority.

Thanks to Craig and Grant for helping us break down the China-Iran axis. As they made clear, this isn't a seamless partnership. It's a tactical alliance built on mutual hostility towards the United States and our allies. China wants leverage over the US. Iran needs a shield against sanctions and isolation. Iran gets cover. China gets leverage. And the free world gets squeezed. Together, they're fraying the US-led, rules-based world order. I'm your host Mark Dubowitz. This has been "The Iran Breakdown." I'll see you next time.