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Iran's "Friend of Hard Times" and China's Plan B

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The Iranian Studies Unit

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Introduction

China's relations with US allies in the Middle East are far more stable and lucrative than its ties with a sanctioned and unstable Iran. Therefore, would the collapse of the Islamic Republic and the establishment of a new Iranian political system, sanction-free and integrated into the US security architecture, in fact be more favourable to Beijing? Could the demise of the current Iranian system, help China's long-term best-case scenario, facilitating a swift transition to a more stable partnership?

Since the United States and Israel launched their recent war on Iran, analysts have viewed China's diplomacy in handling the war through two lenses: either a "hands-off" approach or clandestine support to Iran. Both assumptions, however, overlook a critical analytical pillar: the boundaries Beijing places on its diplomatic engagement during international conflicts. By boundaries, this paper refers to the limits China imposes on its involvement, particularly its avoidance of direct confrontation, reluctance to assume leadership responsibilities in conflict resolution, and preference for rhetorical positioning over costly political or military commitments. These boundaries are usually established early in crises and are designed to protect China's broader long-term strategic priorities, including economic stability and the avoidance of any entanglement in regional wars.

A pertinent example of this was when Chinese President Xi Jinping responded to calls from his then counterpart, Joe Biden, for cooperation to end the Ukraine war by invoking a proverbial constraint: "He who tied the bell to the tiger must take it off."¹ Similarly, regarding the Gaza genocide, the Chinese government published a position paper delegating responsibility to the Security Council,² speaking of it as if it were external to China despite its status as a permanent member, and China has not introduced or co-sponsored any proposal in the Council to stop the war. A similar pattern appeared during the 12 days war on Iran, where China's first statement was calling on a vague "international community" to act and urging "the countries that have influence over Israel to make concrete efforts to restore peace."³

China's initial reaction to the 2026 war on Iran further illustrates these boundaries, as it stated "China is highly concerned over the military strikes against Iran launched by the US and Israel. Iran's sovereignty, security and territorial integrity should be respected. China calls for an immediate stop to the military actions, no further escalation of the tense situation, resumption of dialogue and negotiation, and efforts to uphold peace and stability in the Middle East."⁴ Notably, this and subsequent statements lacked clear condemnation. Instead, Beijing employed the language of "high concern," calling for a "resumption of dialogue" and "restrain," rhetoric that treating an existential attack on a strategic partner as a mere "tense situation" to be managed by others.

1 Ministry of Foreign Affairs of the People's Republic of China, "President Xi Jinping Has a Video Call with US President Joe Biden," 19 March 2022, <https://acr.ps/1L9B9qt>.

2 Ministry of Foreign Affairs of the People's Republic of China, "Position Paper of the People's Republic of China on Resolving the Palestinian-Israeli Conflict," 30 November 2023, <https://acr.ps/1L9B9G2>.

3 Ministry of Foreign Affairs of the People's Republic of China, "Wang Yi Has a Phone Call with Iranian Foreign Minister Seyed Abbas Araghchi," 14 June 2025 <https://acr.ps/1L9B9IQ>.

4 Ministry of Foreign Affairs of the People's Republic of China, "Foreign Ministry Spokesperson's Remarks on the Military Strikes Against Iran by the US and Israel," 28 February 2026, <https://acr.ps/1L9Bakc>.

Tehran's Faded Expectations

After the Twelve-Day War (13–24 June 2025), the Chinese Ambassador to Israel, Xiao Junzheng was quick to assure Israelis that rumours of China arming Iran were a "lie". In fact, all available evidence points to Chinese military assistance flowing in the opposite direction, to Israel. A UN report notes that "Between October 2023 and October 2025, 26 States sent at least 10 consignments of "arms and ammunition" (HS Code 93) to Israel, with China listed among the most frequent suppliers.⁵ Notably, this period includes the Twelve-Day War. Xiao concluded his interview stating "There is no need for Israel to worry... A lie repeated 1000 times is still a lie."⁶

A deep-seated and exaggerated assumption prevailed within Iran before the 2025 war: "The Islamic Republic is China's western line of defence. If it falls, China will be affected and harmed... If we cut off oil, China will face problems; if Iran is absent, China will face challenges. If we do not keep America occupied in this region, America will turn toward China".⁷ This was reinforced by the 2021 Comprehensive Partnership Agreement between Iran and China spanning 25 years. Despite China's vague framing of the deal, general terms as a focus on "economic and cultural cooperation" and emphasizing it has no "quantitative contracts" or "third-party targets",⁸ Iranian officials like Javad Zarif labelled China a "the friend of hard times".⁹

Beijing fuelled this perception through rhetoric. Foreign minister Wang Yi claimed a resolve to elevate ties to "the highest level possible".¹⁰ For Iran, China represented an "ally" and an exit from Western sanctions and a strategic counterweight to the United States. This perception was reinforced by Iran's full membership in the Shanghai Cooperation Organization and BRICS, its geographic role in the Belt and Road Initiative, and continued energy cooperation.

Most significantly, on 12 May 2025, for the first time, China released a white paper dedicated exclusively to national security, titled "China's National Security in the New Era," integrated the Middle East into its own national security framework.¹¹ In it, Beijing pledged to be a "builder of peace" and cited its role in facilitating the Saudi-Iran rapprochement and its support for a political resolution to the Palestine question.

5 United Nations, "Report of the Special Rapporteur on the situation of human rights in the Palestinian territories occupied since 1967, Francesca Albanese: Gaza Genocide: A Collective Crime," 20 October 2025, <https://acr.ps/1L9BacR>.

6 Erez Linn and Dudi Kogan, "A lie repeated 1000 times is still a lie': China's Israel envoy hits back," *Israel Hayom*, 7 November 2025, <https://acr.ps/1L9B9R8>.

7 Theo Nencini and Veronica Turrini, "Iranian Experts Debate the Future of the Iran-China Relationship After the Twelve-Day War," *ChinaMed Observer*, 26 September 2025, <https://acr.ps/hBxSNWE>.

8 Ministry of Foreign Affairs of the People's Republic of China, "Foreign Ministry Spokesperson Zhao Lijian's Regular Press Conference on March 29, 2021," 29 March 2021, <https://acr.ps/1L9B9Vt>.

9 "Zarif Lauds China as Iran's Friend in Difficult Times," *Tasnim News Agency*, 28 March 2021, <https://acr.ps/1L9B9UQ>.

10 Ibid.

11 The State Council of Information of the People's Republic of China, "China's National Security in the New Era," 12 May 2025, <https://acr.ps/1L9B9Zl>.

The Twelve-Day War triggered profound internal disillusionment. Nearly two weeks after a statement by the Chinese Ambassador to Israel, Brigadier General Yadollah Javani, the IRGC's Political Deputy, emphasized that Tehran never requested military aid from China, stating: "The Islamic Republic has not asked for help from any country, not even from members of the Axis of Resistance."¹²

Iranian scholars were more critical. Ata Tabriz noted the war "exposed the limits of Tehran's partnership with Beijing, as China offered diplomatic support but stopped short of deeper involvement that Iranian officials had expected from their proclaimed strategic ally."¹³ Reformist politician Mohsen Amin was more blunt, observing the war proved "Iran is alone in the world and doesn't even have a real strategic ally."¹⁴ Similarly, Hamed Vafaei, Director of the Asia Research Center and Co-Director of the Confucius Institute at Tehran University, cited reports that the Chinese themselves describe their stance as "sitting on a mountain and watching the tigers fight."¹⁵ He warned, "Iran should not expect direct and full support from China," adding, "China's initial uncertainty – during the Twelve-Day War – proves we severely lack a system of strategic bilateral relations."¹⁶

This position was echoed by Ehsan Citsaz, Deputy Minister of Communications, and Behzad Ahmadi, Advisor to the Minister of Communications for International Affairs, both of whom hold research positions at Tehran University: "It is unrealistic for Iran to expect it to jeopardize its [China's] relations with Israel and the United States. Therefore, it seems that our romantic view of China is the product of years of myth-making and strategic wishful thinking, rather than an accurate understanding of the behavior of a pragmatic power".¹⁷

Perhaps most revealing is that the limits of Chinese support were already understood by Iran's adversaries. The relative ease and confidence with which the US and Israel escalated militarily against Iran suggests that neither actor viewed China as a meaningful deterrent in their strategic calculations. Unlike Cold War confrontations, where great-power retaliation shaped the dynamics of escalation, the ongoing war has unfolded without serious concern over potential Chinese intervention, whether diplomatic, economic, or military. This reflects a broader international understanding of the boundaries Beijing places on its Middle East engagement: while China may provide rhetorical support and diplomatic positioning, it remains unwilling to incur major strategic costs or enter direct confrontation with the US over regional conflicts. In this sense, the war has exposed the extent to which China's posture had already become predictable to its chief strategic rival in Washington.

¹² "Iran Did Not Seek Military Help from China or Russia, IRGC Official Says," *Iran International*, 3 August 2025, <https://acr.ps/1L9B9Vo>.

¹³ Ata Tabriz, "China's Limited Support for Iran During War Exposes Partnership Gaps," *IranWire*, 5 August 2025, <https://acr.ps/hBxSO4H>.

¹⁴ Ibid.

¹⁵ Nencini and Turrini, "Iranian Experts Debate."

¹⁶ Ibid.

¹⁷ Ibid.

China's Calculations

It took China two days to respond to the Iranian strikes on the Gulf. While its official statement avoided explicit condemnation, noting instead that Beijing "values the legitimate appeals of Gulf states",¹⁸ China's actions at the UN told a different story. By abstaining from Resolution 2817, China allowed a formal international condemnation of Iran to pass. Although Beijing justified its abstention as a call for a "balanced" view,¹⁹ the strategic outcome was facilitating a diplomatic win for the Gulf and the US. In diplomacy, outcomes carry greater weight than speeches. This abstention was neither a pro-Iran nor an anti-Gulf move. However, China's inaction, through abstention, effectively served as an action that favoured the Gulf. At the same time, to avoid provoking Iran, China did two things: blamed "root causes" (the US/Israel),²⁰ and supported the earlier Russian resolution.²¹

China's relations with US allies in the region are far more stable and lucrative than its ties with a sanctioned Iran. By 2025, for example, China had become the largest direct investor in Saudi Arabia, with \$8.2 billion in investments, a nearly 30 percent increase from 2023. Annual bilateral trade now exceeds \$100 billion,²² with over 1,000 Chinese companies operating in the Kingdom, 35 of which serve as regional headquarters, and the roughly 400 Saudi businesses active in China.²³ Similarly, in the UAE, non-oil trade exceeded \$72 billion in 2022, reflecting an 18 percent growth from \$61 billion in 2021. China is also the third-largest foreign investor in the UAE today.²⁴ In 2024, The UAE Ministry of Economy reports that more than 14,500 economic licenses have been issued to Chinese businesses, a number that has more than doubled since 2019. While this includes major state-owned giants, it also reflects a massive influx of small-to-medium enterprises and private entrepreneurs utilizing the UAE as a regional hub.²⁵

Most telling is China's economic engagement with Israel. Recent rumours that China had banned investments in Israel were publicly rejected by the Chinese ambassador, who stated that "China encourages Israeli friends to engage with us in various forms of economic and trade cooperation."²⁶

¹⁸ Ministry of Foreign Affairs of the People's Republic of China, "Wang Yi Has a Phone Call with Omani Foreign Minister Sayyid Badr bin Hamad bin Hamood Albusaidi," 2 March 2026, <https://acr.ps/1L9B9D3>.

¹⁹ Permanent Mission of the People's Republic of China to the UN, "Explanation of Vote by Ambassador Fu Cong on the UN Security Council Draft Resolution on the Iran-related Situation," 11 March 2026, <https://acr.ps/1L9B9B8>.

²⁰ Ibid.

²¹ Ibid.

²² Nour El-Shaeri, "Saudi Arabia sees 28.8% rise in Chinese FDI to reach \$8.2bn," *Arab News*, 24 August 2025, <https://acr.ps/1L9Baaz>.

²³ Mohammed Al-Sadiq, "Saudi Arabia, China nurturing multi-faceted cooperation amid mutual trust and shared interests," *ChinaDaily*, 28 November 2025, <https://acr.ps/1L9Ba7B>.

²⁴ Ministry of Economy and Tourism of the United Arab Emirates, "UAE and China discuss investment opportunities in new economic sectors, trade, transportation & technology," 19 March 2023, <https://acr.ps/1L9B9tA>.

²⁵ Ministry of Economy and Tourism of the United Arab Emirates, "UAE and China agree to strengthen collaboration in new economy, entrepreneurship, tourism, technology, circular economy, aviation, and logistics transport," 27 February 2024, <https://acr.ps/1L9B9DP>.

²⁶ Embassy of the People's Republic of China in the State of Israel, "Chinese Embassy Clarifies Untrue Media Reports Claiming 'China prohibits investment in Israel'," 13 February 2026, <https://acr.ps/1L9BaEf>.

China's state-owned newspaper *Global Times* dismissed the rumours with numbers, noting that China remained Israel's largest source of imports for the fifth consecutive year in 2024. The report indicates that Israeli imports from China reached \$13.53 billion in 2024, up 19.8 percent from \$11.29 billion in 2023. Total bilateral trade reached \$22.7 billion in 2024 and rose to \$27.44 billion between January and October 2025.²⁷ During the Gaza genocide, Chinese companies also continued their investments in Israel's energy sector. In November 2025, Chinese firms expanded their involvement in three major energy projects, including the Dalia 2 power plant at the Tzafit site (NIS 3.8 billion) and the Eshkol Avshal power plant (NIS 3.3 billion).²⁸ Earlier in February 2025, the Kochav Hayarden pumped-storage power plant – built with an investment of NIS 2 billion – began operations, with PowerChina serving as the contractor and builder. Chinese firms also maintain ownership stakes in Israeli infrastructure projects; for example, PMEC holds a 33.3 percent share in the Alon Tavor power plant alongside Israeli partners.²⁹

The contrast with Iran is stark. While trade and investment with US regional allies surged, China's economic engagement with Tehran plummeted by late 2025. Trade between China and Iran fell by 24 percent to \$9.09 billion in the first eleven months of 2025, compared with \$12 billion during the same period in 2024. Chinese exports to Iran declined by 22 percent to \$6.23 billion, while imports fell by 27 percent to \$2.86 billion, according to China's General Administration of Customs. Chinese exports dropped sharply in November alone, plunging 57 percent to \$170 million from \$395 million in November 2024.³⁰

In the energy sector, China's withdrawal has been equally methodical. Following the collapse of the nuclear deal (Joint Comprehensive Plan of Action), major Chinese state-owned enterprises began a quiet exit to avoid secondary US sanctions. For instance, Sinopec effectively withdrew from the Yadavaran Development Plan, and CNPC abandoned its role in Phase 11 of the South Pars gas field, the world's largest natural gas deposit.³¹ These trends are captured in Table 1, highlighting the divergence between China's expanding ties with US allies and its declining engagement with Iran.

27 "Chinese Embassy in Israel refutes false reports claiming 'China bans investment in Israel,'" *Global Times*, 13 February 2026, <https://acr.ps/1L9B9Is>.

28 Dean Elmas, "China still winning major Israeli infrastructure deals," *The Jerusalem Post*, 17 November 2025, <https://acr.ps/1L9B9ph>.

29 Ibid.

30 "China-Iran trade plunges 24% as sanctions bite and Beijing shifts oil suppliers," *bne IntelliNews*, 24 December 2025, <https://acr.ps/hBxSOsQ>.

31 "Chinese Are No Longer Willing to Work on Iran Oil Projects," *Iran International*, 15 February 2023, <https://acr.ps/1L9Ba17>.

Table 1. Diverging Trends in China's Economic Relations with Selected US Allies and Iran

Country	Trade with China	Chinese Investment	Additional Indicators	Trend
Saudi Arabia	Over \$100 billion annually	\$8.2 billion FDI by 2025	1,005 Chinese companies operating in the Kingdom	Upward
UAE	\$72 billion non-oil trade	Third-largest foreign investor	14,500 Chinese business licenses issued	Upward
Israel	\$27.44 billion trade in 2025	~7 billion ILS investment in energy infrastructure	China is Israel's largest import source : \$13.53B	Upward
Iran	\$9.09 billion trade (2025) ↓24%	Withdrawal from major energy projects	Sinopec and CNPC exited key projects	Downward -24%

Source: Data collected by the author.

These resources were not abandoned out of a lack of interest, but as part of a strategic recalibration; China opted to redirect its capital toward US allies as a Plan B, prioritizing economic security over political alignment. Rather than attempting to directly shape the conflict, China appears focused on adapting to its possible outcomes. In other words, while Beijing may not be able to control the conflict, it can manage its consequences.

China's Plan B could be seen in its recent ability to adapt to new power structures established by the United States, manifesting the ancient Chinese wisdom: "It does not matter if it is a yellow cat or a black cat, as long as it catches mice".³² This was evident in its rapid normalization and opening of relations with the new Syrian government less than three months after the collapse of Bashar Assad, the "Chinese friend".³³ Another example is Venezuela; while China "strongly condemned... the American measure against its president" regarding the arrest of Nicolás Maduro,³⁴ Trump reassured Beijing that it is "welcome to come in and make a great deal on oil".³⁵ This is what occurred, as reports indicated that China continued its oil trade after Maduro's arrest through US-approved channels.³⁶ China seems sure that it can secure its share of Iranian oil at market price whether the current regime is replaced or remains in control.

Interestingly, the US described the sale of Venezuelan oil to China as "legal," stating: "China has already bought some of the crude that's been sold by the US government... Legitimate Chinese

³² Deng Xiaoping Works, "Restore Agricultural Production 1962," 7 July 1962, <https://acr.ps/hBxSOAT>.

³³ Ministry of Foreign Affairs and Expatriates of the Syrian Arab Republic, "President Al-Sharaa Receives Chinese Ambassador Shi Hongwei in Damascus," 21 February 2025, <https://acr.ps/hBxSOIW>.

³⁴ Ministry of Foreign Affairs of the People's Republic of China, "Foreign Ministry Spokesperson's Remarks on the US Military Strikes on Venezuela," 3 January 2026, <https://acr.ps/hBxSOQZ>.

³⁵ Tamsin McMahon and Jennifer A. Dlouhy, "Trump Says He Welcomes China, India Investment in Venezuela Oil," *Bloomberg*, 1 February 2026, <https://acr.ps/hBxSNUY>.

³⁶ Rong Wei Neo and Andrew Rosati, "China Bought Some Venezuelan Oil From the US, Wright Says," *Bloomberg*, 12 February 2026, <https://acr.ps/hBxSO31>.

business deals under legitimate business conditions".³⁷ This pattern suggests that China could be also prepared for various outcomes in Tehran. Years of US-led Western sanctions on Iran have stifled the introduction of Chinese infrastructure and energy projects in the country. Consequently, a regime change that leads to the lifting of sanctions, even if it produces a government more aligned with the West, could serve China's long-term economic interests more effectively than the status quo. In practice, Beijing's engagement with US-aligned states in the Middle East has proven significantly deeper and more dependable than its relationship with a heavily sanctioned Iran.

By removing the sanctions barrier, China would be able to pursue its energy and infrastructure objectives without the constant threat of US penalties. Taken together, these dynamics suggest that Beijing's role during the war was not a sign of weakness or indifference, but a calculated strategy designed to preserve flexibility across multiple political outcomes in Tehran.

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³⁷ "China bought 'legitimate' Venezuelan oil from US after Maduro seizure, energy secretary says," *South China Morning Post*, 12 February 2026, <https://acr.ps/hBxSOB4>.

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