

D. Trump's Iranian dilemma: "To strike or not to strike"

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Abstract

ARVAK addresses a new round of escalation around Iran in early 2026 through the prism of the intensified activity of the great powers—the PRC and the RF. The hidden mechanisms of military support for Tehran by Beijing and Moscow, aimed at creating an “anti-aircraft dome” over the IRI, are considered. Special attention is paid to internal destabilizing factors in the United States and the personal characteristics of Donald Trump as key variables determining the likelihood of the start of a full-scale regional conflict. It is noted that the stability of the Iranian regime has become an existential condition for preserving the continental rear for the PRC and the RF.

Keywords: Iranian escalation, Middle East geopolitics, PLA, CPEC, Russian-Chinese alliance, Donald Trump, Strait of Hormuz, energy security, military-technical cooperation.

1. The Chinese factor: military presence in Pakistan and the CPEC corridor

A review of information from media sources in the Middle East and Central Asia reveals an unprecedented intensification of China's activity in the context of the escalation around Iran.

According to Pakistani sources, parallel to the rising escalation around the IRI, Beijing initiated an operation to expand its military presence in Pakistan, specifically in the mountainous province of Gilgit-Baltistan, where large-scale work is underway on the construction of the China–Pakistan Economic Corridor (CPEC). The People's Liberation Army of China (PLA) has already concentrated a group of 10,000 troops here, and Beijing intends to strengthen it with additional forces.

At the official level, China and Pakistan deny the deployment of new Chinese units in Gilgit-Baltistan; however, satellite imagery indicates that such an operation is being conducted on a large scale and at a high pace. According to incoming reports, the PRC aims not only to strengthen security measures around the infrastructure of the CPEC corridor under construction but also to create a strategic bridgehead in case of complications in the military-political situation in Afghanistan, which is directly linked to the Iranian escalation.

2. The Strait of Hormuz and supplies of “rocket raw materials”

In early February 2026, it became known that Beijing sent multi-purpose guided-missile destroyers (*Type 052D* and *Type 055*) to the Strait of Hormuz. The official version of the ship deployment is participation in joint naval exercises with the navies of Iran and Russia in the Sea of Oman. Meanwhile, there is no doubt that the purpose of the naval campaign is to demonstrate readiness to protect the IRI and to take practical measures to collect and transmit intelligence to Tehran regarding the maneuvers of the U.S. Navy strike group concentrating in the Arabian Sea.

Furthermore, it is obvious that the PLA Navy destroyers must ensure the unhindered delivery of Chinese military cargo to the Iranian port of Bandar Abbas. This primarily concerns sodium perchlorate – a basic component for the production of solid-fuel rockets. According to Israeli intelligence, between July 2025 and January 2026, China has already managed to send up to 2,000 tons of this chemical mixture to Iran via 10–12 sea voyages. In November 2025,

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the Americans managed to intercept one of the Chinese vessels carrying sodium perchlorate bound for Iran and confiscated the entire cargo; however, the supplies did not stop. With the concentration of U.S. carrier strike groups in the Arabian Sea, the Americans' capabilities to blockade Iranian ports have increased, and the Chinese destroyers are evidently intended to ensure conditions that prevent a repetition of the November incident. Thus, China is making maximum efforts to restore Iranian missile arsenals, in which, according to American-Israeli sources, it has already achieved tangible success.

3. Diversification of supplies and the “Air bridge” of the RF and PRC

Beijing has successfully diversified its methods of military supplies to Tehran, transporting other military cargo by air and land (through the territory of Pakistan). Information regarding the nomenclature of these supplies is kept strictly secret; however, experts believe it primarily involves electronic intelligence equipment and advanced air defense systems. According to international flight monitoring centers, since January 2026, the dynamics of PLA Air Force military transport flights to Iran and back have significantly increased.

Similarly, a sharp increase in the number of Russian military transport flights to Iran through Caspian airspace has been observed. Monitoring centers testify to systematic flights of several *An-124-100* transport aircraft and the *Il-76TD* special-purpose aircraft. According to Russian military analysts, this may involve the delivery of “*critical technologies or heavy weaponry*” to Iranian allies. Russian experts believe that Moscow and Beijing, through their supplies, aim to provide a first- and second-tier anti-aircraft “*dome*” over Iran and effectively “*organize a no-fly zone in the region*”.

4. IRI: preparation for a lingering war

There is every reason to assert that the new round of escalation around Iran could hypothetically evolve into a more large-scale and lingering war than the July 2025 precedent. Despite the increased firepower of U.S. forces concentrated in the region compared to the summer campaign, Tehran currently appears better prepared to repel attacks and carry out retaliatory actions. This is due, in addition to the adjustments made by the Iranian command in its defense strategy, to more resolute military-political support for Iran from China and Russia.

Beijing is, in essence, strengthening the Iranian rear in Pakistan and Afghanistan by expanding its military contingent there, as well as providing the IRI with weaponry and raw materials of critical importance to the country's defense potential. Moscow, in turn, is also significantly increasing military supplies to Iran, both within the framework of previously signed defense contracts and in the format of gratuitous aid amid the escalation around the Islamic Republic. Finally, the PRC and the RF are jointly signaling their direct military presence in the area of the Strait of Hormuz, significantly limiting the freedom of operational action for the American-Israeli tandem, as any, even accidental, precedent of fire contact with the Russian-Chinese naval group carries the risk of igniting a world war.

5. IRI strategy: unacceptable damage and economic collapse

Virtually all experts monitoring the situation agree that Iran, enjoying the overt support of Russia and China, will not limit itself to strikes on the Jewish state in the event of an

American-Israeli attack and will expand the zone of retaliatory destruction. Potential targets for Tehran's missile and drone strikes, besides Israeli targets, will primarily be the U.S. aircraft carrier *Abraham Lincoln*, almost all U.S. bases in the Middle East – including the largest, Al-Udeid in Qatar, and possibly the Diego Garcia base in the Indian Ocean – as well as the oil infrastructure of Saudi Arabia, Qatar, and Azerbaijan.

UAE territory could also come under attack, despite the Emirates' categorical refusal to provide their airspace to the American-Israeli tandem for strikes on the IRI. It is important for Tehran, as a response to an attack on its territory, to provoke a financial and economic collapse in the world; therefore, the nominal neutrality of Abu Dhabi, which is of key importance to the world financial system, will not prevent the intentions of Iran's military-political authorities. The statement made on February 1, 2026, by the Supreme leader of the IRI, Ayatollah Ali Khamenei, that an attack on Iran "*this time*" would respond to the world with a great regional war, was made precisely with a hint at the circumstance that Iran has nowhere further to retreat. Consequently, existential risks will prompt it to "*set fire*" to the entire region.

6. The IRI as a guarantor of the Eurasian balance of power

This is a completely objective and noteworthy thesis, as the final destruction of the fragile balance in the Middle East and the Persian Gulf could lead to a global collapse in the energy, trade, economic, and financial spheres. In this context, Khamenei's message should be interpreted not only as a threat to the collective West but also as a warning to his allies, which should prompt them to deter the aggressive behavior of the U.S. and its militaristic aspirations more resolutely.

Iran, with its current military-political leadership, is a key country maintaining the balance of power between the collective West on one side and the Russian-Chinese geopolitical duo on the other. The fall of the current system of power in Iran, the collapse of the country according to the Syrian model, or its secularization according to Western patterns would entail the collapse of the security foundation for China and Russia in the heart of the Asian continent. For Beijing, the fall of Iran would mean the loss of its main sovereign source of critically important oil supplies, as well as a key stabilizing factor ensuring the global security of the "Great Silk Road" routes to Europe through Central Asia and, indeed, Iranian territories.

Furthermore, an integral and sovereign Iran serves as a reliable geostrategic buffer for the PRC, deterring the expansion of Middle Eastern chaos and preventing the large-scale penetration of Islamic and radical-nationalist extremism into Central Asia. In light of the "*Uyghur separatism*" problem, this is an extremely important circumstance prompting Beijing to provide comprehensive support to Tehran. In total, a stable and predictable Iran represents a key factor in the strength of China's continental rear. Against the backdrop of rising escalation around Taiwan and American-Chinese tension throughout the Indo-Pacific region, Beijing is making every effort to strengthen Iranian sovereignty.

7. Interests of the RF and the role of the IRI in the Southern direction

The escalation around Iran alarms Moscow to an equal degree. Iran is practically the only "window" for Russia to exit to the south – to the Indian Ocean, the Middle East, and Africa. Iran's communication role for Russia has significantly increased in light of the confrontation with the West over the situation in Ukraine and the factual isolation of the RF in the European

direction. Also, for Moscow, Iran's role as a balancer of the security system in Central Asia is indispensable, where traditional Western rivals are persistently trying to penetrate, including through the concept of Pan-Turkic unity and political Islam exported from Turkey.

The IRI is currently viewed by Moscow as a natural barrier adjacent to Russia from the south, helping to contain the expansion of the West into the zone of strategic responsibility of the SCO. In this regard, Russia has significantly increased its attention to the IRI after the factual political-diplomatic failure in the Turkish direction, where it once tried to mark the extreme geostrategy line of deterrence against the U.S. and its European allies.

In light of the above, maintaining the stability of the current government in the IRI and preventing chaos of the Syrian-event type equally meet the existential interests of the PRC and the RF, which contributes to the further strengthening of their alliance.

8. Internal stability and U.S. calculations

According to several Western analysts, despite the exceptional importance of Iran, China and Russia will not enter into a direct military conflict with the West “*for the sake of saving Tehran*”. This forecast is close to reality, as evidenced, among other things, by information regarding the absence of large-scale preparations by Beijing and Moscow for direct participation in the war. At the same time, Tehran itself does not see the need for the direct involvement of its allies and partners in the conflict in the event of a U.S. attack, considering the provision of military equipment and satellite data to be sufficient. The Islamic Republic possesses the ability to organize independent defense, being self-sufficient in terms of human resources and the exercise of internal control over its territory.

The critical vulnerable link in Iran's defense system has traditionally been internal instability. It is caused by the deep fragmentation of society along ethnic, ideological, and cultural-civilizational lines, as well as a protracted socio-economic crisis that has systematically provoked large-scale anti-government demonstrations in recent decades. In this context, it is logical to consider that D. Trump's decision to prepare for another attack on Iran was made against the backdrop of mass unrest in the country due to the hyperinflation of the national currency, rather than for foreign policy reasons. Iran did not provoke the U.S. and Israel into a new attack; therefore, the pretexts for it were allegedly facts of the violent suppression of social protests in the country. Obviously, the reasons that prompted the U.S. to prepare for a strike on the IRI were dictated by reports from the relevant services about the ripe peak of internal destabilization in Iran, which could be capitalized into the process of the collapse of the political system of this country by a strike on the military-political leadership and critical infrastructure objects. It is no coincidence that in his statements regarding the new war, president D. Trump repeatedly referred to the need to assess the “*scale of cruelty*” of the Iranian authorities, making the final decision on the attack dependent on the readiness of the protest masses to continue resistance.

9. Errors of the D. Trump team and IRI consolidation

Western experts believe that Trump's slowness was caused by Tehran's ability to suppress unrest promptly and harshly in the country and quickly establish control over its entire territory. Washington and Tel Aviv did not expect such effectiveness from the IRGC, nor the

consolidation of power, which showed no signs of a split between its conservative and reformist factions. According to Israeli analysts, the Trump team missed the moment of attack by miscalculating the protest potential of the Iranian masses and failing to shape the social unrest into a structured political process. In this sense, putting forward a consolidating political figure for the protests (for example, Prince Reza Pahlavi) would have been more effective than the “cruise” of the carrier group *Abraham Lincoln* into the Arabian Sea.

The focus of the U.S. and Israel on preparing the military component of “*regime change*” pushed the ideological-political background of the events in Iran to the second plan, leaving the protests at the stage of spontaneous actions easily suppressed by the authorities. Now, a strike on Iran could provoke the opposite effect and unite Iranian society around the “*ruling regime*”. The protests in Iran did not give birth to a political leader and left separatist movements in the country indifferent. The Kurds, disappointed by the surrender of Syrian Rojava to Ankara and Damascus, essentially refused to take active action against Tehran; Iranian Azerbaijanis rejected the calls of Iranian monarchists led by Prince R. Pahlavi to join efforts; the Baluchis initially chose a cautious, waiting position.

10. The unpredictability factor and the “Epstein case”

Under the prevailing conditions, a late strike on Iran may damage the country’s military infrastructure or even lead to the physical elimination of a number of key figures in its military-political elite, but it will not lead to the collapse of the system of power, while provoking retaliatory actions against the military-strategic, political, and economic interests of the U.S. in the Middle East. Such a scenario would be a major defeat for the D. Trump administration in the context of its struggle not so much against Iran itself as against the RF and the PRC.

According to the global expert community, D. Trump has not yet been able to decide on a further course of action regarding Iran. This is precisely what the withdrawal of the strike carrier group *Abraham Lincoln* further away from the reach of Iranian anti-ship missiles is connected to. Nevertheless, as analysts suggest, the current head of the U.S. is largely unpredictable, and an attack on Iran could equally take place or be postponed.

Washington’s unpredictability is dictated by D. Trump’s personal characteristics: impulsiveness and an unwillingness to solve problems consistently. His reliance on “power surge” tactics and maximalism in diplomacy have provoked a crisis in the management of U.S. global initiatives, creating a tangle of contradictions in different regions of the world. Peace negotiations in Ukraine hanging in uncertainty, a vague Venezuelan agenda, the crisis in American-European and American-Canadian relations regarding Greenland and the future of NATO, the initiation of a new blockade of Cuba, the Iranian escalation, and, finally, tariff and sanction “wars” with the world’s largest economies – all of this is due to the desire of the American leader and his team to establish U.S. global dominance regardless of international law and the ability of their own country to withstand such a load.

In the expert community and among D. Trump’s opponents, the dominant opinion is that his foreign policy style is not so much decisiveness as systemic volatility and an imbalance between personal ambitions and the real resources of the state. The critical risk management skills that brought D. Trump success in real estate development prove destructive in international politics, which requires pragmatism and circumspection. Washington’s global

competitors prefer to wait out the “storm” raised by D. Trump on the international stage, counting on the exhaustion of the patience of the American elites themselves and the public, who are showing signs of fatigue from constant daring foreign policy initiatives and dangerous combinations.

One sign of the approaching fundamental political changes in the U.S. can be considered the reappearance in the public sphere of the “Jeffrey Epstein case”, in which, among others, scandalous facts from D. Trump’s own past were declassified. According to analysts, this could equally contribute to the aggressiveness of the Trump team toward Iran – as an attempt to distract the American public’s attention to a new war – or “bury for a long time” the trend of demonizing the IRI, which, at the suggestion of its allies – the PRC and RF – allegedly threatens the order and security of all of Asia.

The prospects for settling the Iranian problem today are determined to a greater extent by the internal political situation in the United States rather than by the diplomatic process in Oman. Although Tehran’s nuclear program remains the official subject of dialogue, the deciding factor is the political trajectory of Donald Trump and the stability of his administration.