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President Masoud Pezeshkian (c) meets with Pakistan's Interior Minister Mohsin Naqvi (3rd L) in Tehran, Iran on May 17, 2026. president.ir

Geopolitical implications of Trump's visit to China for Iran & regional order



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OPINION EXCLUSIVE

The official visit of Donald Trump to Beijing from May 13 to 15, marked the first trip by a sitting US president to China since 2017. It unfolded against a backdrop of global tensions—most notably the war and military aggression by the United States and Israel against Iran in February, severe disruptions to navigation in the Strait of Hormuz, and a global energy crisis—and, as such, drew widespread international attention. From a geopolitical standpoint, the visit can be seen as an attempt by two major global powers to manage their strategic rivalry under conditions where, at least in Beijing's view, the "Thucydides Trap" continues to threaten their relations. Yet, as evidence suggests, economic and security imperatives have pushed both sides toward carving out a framework of "stability within constructive competition."

A defining paradigm shift for Iran

The first notable aspect of the visit was its postponement due to the joint US-Israeli aggression against Iran, Tehran's retaliatory responses, and the effective closure of the Strait of Hormuz—developments that underscore the rising

weight of West Asia in Washington-Beijing calculations. A significant paradigm shift has occurred here, one that directly relates to Iran's national interests. While US national security documents and earlier projections suggested that South and East Asia would dominate the agendas of Xi Jinping and Trump, a substantial portion of non-bilateral discussions instead focused on West Asia and its evolving dynamics.

In this context, China—as the largest buyer of Iranian oil, absorbing more than 80% of Tehran's exports, and increasingly dependent on stability in the Persian Gulf for its energy security—finds itself needing to coordinate positions with a power that is simultaneously the region's aggressor and a foremost security threat to China itself.

In response to what many countries, including China, have described as a clear violation of Iran's sovereignty, the UN Charter, and international law, the Islamic Republic of Iran launched defensive operations, including imposing restrictions on transit through the Strait of Hormuz. Tehran emphasized that the waterway remained open to commercial vessels not linked to the aggressors, while identifying the US military presence and blockade as the primary obstacle to the free flow of energy. This stance created a "geopolitical lever" for Iran in countering unlawful aggression—an issue that made its way into Trump's consultations in Beijing and was explicitly referenced in his remarks at Zhongnanhai.

Among the key developments tied to West Asia and the Strait of Hormuz during Trump's visit were preliminary agreements to expand access for US companies and deepen mutual investments with China. In parallel, Beijing signaled interest in purchasing more energy from diversified sources, including the United States, in a bid to balance the weight of actors in this sector and take practical steps toward reducing its dependence on Middle Eastern energy. Although Xi Jinping underscored Taiwan as the foremost issue in US-China relations during talks with Trump, it is difficult to ignore the reality that the Hormuz crisis—on which China had previously put forward proposals and which remains a core concern for Washington—featured prominently in recent exchanges between the two sides.

From a geopolitical perspective, the US-Israeli aggression against Iran has turned the Strait of Hormuz into a central arena of regional and global confrontation. The resulting disruptions to navigation have driven up energy prices and piled pressure on all parties. China, having invested billions in the Belt and Road Initiative, cannot afford a prolonged crisis. Accordingly, while continuing to import energy from Iran, Beijing has simultaneously sought to pursue a form of mediation that might be described as "controlled risk-taking." At the same time, reports suggesting the possibility of US-China trade-offs over Iran in exchange for concessions on Taiwan or in the technology sphere—po-

tentially turning Tehran into a "bargaining chip among great powers"—appear to have caught the attention of Iranian policymakers. This is reflected in diplomatic moves that encouraged Abbas Araghchi, as the Islamic Republic's top diplomat, to meet his counterpart Wang Yi ahead of Trump's visit, followed by travel to New Delhi for talks with Indian and Russian officials—an effort aimed at shaping a multilateral diplomatic response to neutralize such risks.

Another key point is that the visit, taking place amid the Hormuz and West Asia crisis, can be interpreted as an attempt by Beijing and Washington to recalibrate the balance of power in the Persian Gulf in favor of energy exporters. At the same time, by creating opportunities for regional states to extract concessions from US-China competition, it may open space for "regional multipolarity." In such a setting, strengthening and expanding ties with BRICS, the Shanghai Cooperation Organization, and neighboring countries appears increasingly essential for Iran.

Need for strategic realism in Tehran

While it may take time for the full dimensions of Trump's visit to China to become clear, the trip already stands as an example of "managing competition in an emerging multipolar order." Alongside the opportunities it presents for Tehran to play its hand more astutely, it carries a fundamental warning: transforming the Strait of Hormuz into

a globally influential lever could render Iran's dependence on Beijing more precarious than before.

In this context, Iran's diplomatic system, while maintaining its defensive and legal principles vis-à-vis the aggressors, must capitalize on the unique assets at its disposal—including the resilience and cohesion demonstrated on the ground—by putting forward a comprehensive, strategic, and multilateral package. Through targeted, precise, and strategic negotiations, Tehran can both secure its future energy interactions with powers such as China and deepen its participation in Beijing's global initiatives, while making full use of the current window of opportunity to pursue a dignified and calculated engagement with China.

It should not be forgotten that although Iran-China relations are deeply rooted, in today's geopolitical landscape, durable interests are increasingly defined by production and value chains. With a clear-eyed understanding of evolving Beijing-Washington dynamics—traces of which can be discerned between the lines of Xi-Trump negotiations—Tehran has the potential to consolidate its position as an influential regional actor rather than a mere pawn in great-power bargaining. Trump's visit to Beijing and his meeting with Xi Jinping serve as a reminder that smart, targeted, and long-term diplomacy—when coupled with tangible levers such as the Strait of Hormuz—can function as a key to survival in the Asian century.