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Bull in the China Shop- America's Israel Policy Harms Relations with China

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EXECUTIVE SUMMARY

Unwavering U.S. support for Israel risks destabilizing the Middle East by enabling escalatory Israeli actions, such as strikes on Iran and the invasion of Lebanon. This threatens American regional interests, including oil production and counterterrorism efforts, while also jeopardizing similar Chinese interests, such as stability for the Belt and Road Initiative (BRI), energy investments, and diplomatic peace efforts.

These results fuel Sino-American rivalry, portray the United States as reckless, and further encourage China to align with adversaries like Iran, influencing United Nations (UN) voting and economic allegiances. Together, these dynamics worsen relations with China and exacerbate the emerging second Cold War.

In an effort to not only protect its own national interests, but also forestall increased diplomatic fallout with China, the U.S. government should set clear red lines denoting consequences for provocative Israeli actions that undermine overlapping Chinese and American national interests. Actions the United States should expressly forbid include:

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- Further Israeli Defense Forces (IDF) West Bank settlement or official annexation.
- Further direct military strikes against Iran of any kind.
- Official changing of policy regarding the Temple Mount.
- IDF occupation of Lebanese towns north of the Awari River for more than 6 months, north of the Litani River for more than one year, and north of Lebanon's southern border for more than 2 years.

Specific actions the U.S. government might take in response to any crossing of these red lines could include:

- Sanctions that target West Bank settlers visibly linked to the IDF.
- Withdrawal of stationed forces, distancing of fleets off the coast of Gaza, etc.
- Presidential refusal to deliver F-35 Joint Strike Fighters, F-15s, KC-46A Aerial Refueling Tankers, CH-53K Heavy-Lift Helicopters, GBU-31(v)3 and other JDAMs/bunker busters, or other such military platforms critical to Israeli deterrence and operations as are purchased through the Foreign Military Financing (FMF) process.
- Refusal to renew the Consolidated Appropriations Act carryovers, or seriously limiting amounts as part of the renewal process, thus increasing Israel's international loan costs/rates.

American Interests in the Middle East Are Limited But Strong

The United States' core national interests in the Middle East should center mainly on ensuring the free flow of oil, preventing nuclear proliferation, and combating terrorism.¹

Despite increased domestic oil production, the U.S. economy remains integrated into the global market, making it susceptible to price volatility stemming from Middle Eastern oil production instability.² Hence, maintaining a steady oil supply from the region is very important not just for the global economy but for U.S.

interests.³

For example, in scenarios similar to the 1973 Arab oil embargo, global oil supplies could shrink by six to eight million barrels per day, driving prices up to \$157 per barrel.⁴ This could cause severe economic downturns in the United States⁵ Recent conflicts in the Middle East have caused oil prices to surge modestly, reflecting these economic concerns surrounding potential supply disruptions.⁶

Preventing the spread of nuclear weapons in the Middle East is also extremely important to U.S. interests. Several violent terrorist organizations such as al-Qaeda have actively sought weapons of mass destruction.⁷ In late April 2024, an Iranian lawmaker stated there is only a "one-week gap from the issuance of the order to the first test" of a nuclear bomb by Iran.⁸ Iran's acquisition of nuclear weapons and associated developments could trigger a nuclear cascade in the region such as with Saudi Arabia. Increased presence of nuclear weapons could make them more accessible to extremist actors - not necessarily terrorists or rogue actors, but extremists within the government itself - who have violent intentions towards the United States⁹

Lastly, countering terrorism remains a high priority, given that terrorist groups operating from the Middle East have previously targeted the U.S. homeland and its interests abroad. Obvious examples include the September 11 attacks, the Boston Marathon bombing, and the recent January 1st New Orleans Bourbon Street attack. From September 11 the property damage alone cost about \$100 billion, and estimates of the total economic damage inflicted by the attack range up to \$2 trillion.¹⁰ The cost of the two resulting wars in Afghanistan and Iraq has been estimated recently by Brown University scholars at about \$4 trillion.¹¹

Chinese Interests Are Similarly Strong

China's core national interests reside within Middle Eastern regional stability, sharing significant overlap with the aforementioned American interests.¹²

Energy and Economic Interests

Regarding energy and economic interests, Beijing has greatly increased its investment activities in

the Middle East.¹³ Due to heavy reliance on energy imports, the Middle East holds particular importance for the maritime component of the BRI, known as the Maritime Silk Road Initiative (MSRI).¹⁴ According to the China BRI Investment Report of 2021, the Middle East and North Africa region (MENA) was the primary focus of Chinese BRI investments that year.¹⁵ This trend continued into 2022, with Middle Eastern countries receiving around 23% of China's BRI engagement, a notable increase from 16.5% in 2021.¹⁵

From 2005 to 2021, Chinese investments in the Middle East and North Africa totaled approximately \$213.9 billion, with Saudi Arabia emerging as the largest recipient. Saudi Arabia alone attracted \$43.47 billion in Chinese investment over that time period.¹⁶

China's projects in the region include a joint venture between COSCO Shipping Ports and Saudi Arabia's Public Investment Fund to develop and operate the Red Sea Gateway Terminal at Jeddah Islamic Port.¹⁷ Other key initiatives involve investments in the TEDA area of the Suez Canal Authority and managing the new port terminal in Haifa Bay.^{18,19} In Iraq, China emerged as the leading financier of infrastructure projects in 2021, with approximately \$10.5 billion allocated to construction contracts.²⁰ Additionally, China announced plans to invest \$10 billion in infrastructure within the autonomous Kurdistan Region in northern Iraq.²¹

One of the most significant developments has been the Iran-China "Comprehensive Strategic Partnership" agreement, valued at an estimated \$400 billion—roughly 10% of China's total BRI budget.²² This agreement includes plans for the joint development of the Chabahar port and the establishment of a new oil terminal near the Jask port, located south of the Strait of Hormuz. Additionally, China has secured long-term energy partnerships with Gulf Cooperation Council (GCC) countries and invested in energy infrastructure.²³ Beyond fossil fuels, China has increasingly turned its attention to renewable energy in the region. For example, Chinese companies are leading sustainable projects like the \$972 million contract signed by China Energy Engineering to construct a two-gigawatt photovoltaic solar power plant in Saudi Arabia.²⁴

Diplomacy and Security

In addition to economic investments, China has actively sought to play a more prominent diplomatic and peacekeeping role in the Middle East. Notably, in March 2024, China successfully mediated talks between Saudi Arabia and Iran, leading to the restoration of diplomatic ties between the two regional powers.²⁵ China hosted the tenth ministerial conference of the China-Arab States Cooperation Forum in May 2024, which Xi Jinping personally attended.²⁶

Regarding the other interests such as nuclear non-proliferation and counterterrorism, China is very similar to the United States. China has a similar history of grappling with Islamist extremism, especially regarding the ongoing oppression of their Uyghur population as well as the destabilization of Afghanistan following the American military withdrawal. China experienced serious Islamist pushback following Hanification attempts in its Western Xinjiang province. Uyghur militants have killed potentially thousands of Chinese in terrorist attacks around China during an ongoing decades-long insurgency.²⁷ The insurgency initially targeted police and symbols of Chinese governmental authority, but eventually expanded to include civilians. In 2009, these pressures reached a fever pitch when riots sparked in Urumqi, killing hundreds. Ever since then, China has viciously cracked down on the region, oppressing millions of people with arrests, torture, concentration camps, and religious persecution. It has led to greater radicalization, something terrorist groups take advantage of for recruiting purposes.^{28,29} The Islamic State, for instance, regularly publishes Uyghur-language editions of its radio bulletins and magazines, while the Turkistan Islamic Party has been releasing videos on a near-weekly basis.³⁰

It is for these reasons of promoting peace in Xinjiang, preventing terror attacks across China, and protecting significant diplomatic and economic investments that China's core interests overlap with the United States in a stable Middle East.

Israeli Military Activities Are Frequently Escalatory

Israel's current military activities have caused serious

escalations in regional conflicts which threaten to snowball and jeopardize American and Chinese shared national interests. In response to the October 7th Hamas attacks which left over a thousand Israeli citizens dead, the administration of Prime Minister Benjamin Netanyahu has waged a military campaign in the Gaza Strip lasting over 15-months.³¹ Palestinian health officials have reported approximately 150,000 casualties, and the IDF has claimed to only have killed 17,000 militants, indicating significant damage to the civilian population.³²

Nearly two million people have been displaced.³³ Nearly \$20 billion in infrastructure damages alone have been incurred, over a thousand mosques and heritage sites have been damaged or destroyed, and an alleged 85,000 tons of explosives have been dropped.^{34,35,36} As a foreign nation that was not directly attacked, the United States cannot afford to equivocate about the justifiability of Israel's actions when considering its own response. The only pertinent questions are those directly relevant to protecting America's core national interest of stability and peace in the region. This means escalation is largely undesirable, and so one must ask: have Israel's actions led to escalations?

Regional Conflict

The answer is obviously yes. The conflict has already spiraled into a regional war. In response to Netanyahu's massive retaliation, the Houthis launched a drone attack on July 19th of 2024, as well as ballistic and hypersonic missile attacks in December 2024.^{37,38} Hezbollah launched thousands of rockets at Israel and staged various attacks. Israel escalated by decapitating Hezbollah and Hamas with leadership strikes, invading Lebanon in bordering villages such as Ayta ash-Shab, Mais al-Jabal, and Kfar Kila, and declaring they have "a plan with escalation steps... connect[ed] to a bigger strategy."^{39,40} While a fragile ceasefire is in place, both sides have accused one another of violations and the situation remains tense.⁴¹ It is reasonable to assume that, due to unresolved political, religious, and ethnic strains which are largely responsible for the conflict in the first place, the ceasefire will not be sustainable.

Other escalations have occurred, such as Iran's completely ineffectual ballistic missile strike that was

entirely rebuffed by Israel's air defense systems.⁴² Rather than use the successful defense as proof of Iran's incompetence and Israel's superiority, Israel used it as justification to retaliate even further with extensive bombardments prompting Iranian Supreme Leader Ali Khamenei to declare via state media "[T]he enemies, whether the Zionist regime or the United States of America, will definitely receive a crushing response to what they are doing to Iran and the Iranian nation and to the resistance front."⁴³

Israel assassinated key Iranian officials such as Islamic Revolutionary Guard Corps (IRGC) Brigadier General Mohammad Reza Zahedi and IRGC Quds Force Brigadier General Sadegh Omidzadeh both while in Syria.^{44,45} Following the collapse of the Syrian Bashar al-Assad regime, the IDF moved into the Golan Heights and occupied border villages as well as strategic locations like Mount Hermon.⁴⁶ Israel has also expedited settlement proliferation into the West Bank.⁴⁷

Escalation in the West Bank

In 2024, the United Nations Office for the Coordination of Humanitarian Affairs (OCHA) documented approximately 1,400 incidents involving Israeli settlers attacking Palestinians or damaging their property in the West Bank, including East Jerusalem. This averages nearly four incidents daily, marking the highest rate since OCHA began recording such data almost two decades ago. These attacks encompassed physical assaults, arson, raids on Palestinian communities, and the destruction of agricultural assets, notably olive trees.⁴⁸

Israeli military operations have intensified, leading to significant Palestinian casualties. Between October 7, 2023, and June 3, 2024, 508 Palestinians, including 124 children, were killed in the West Bank, with Israeli forces responsible for the majority of these deaths. Additionally, over 5,150 Palestinians, including about 800 children, were injured, with more than a third wounded by live ammunition.⁴⁹

The cumulative effect of violence, demolitions, and movement restrictions has led to a severe humanitarian crisis. The Norwegian Refugee Council reported that in the first half of 2024, over 1,000 Palestinians were displaced, and nearly 160,000 were adversely

affected by demolitions.⁵⁰ The economic situation has deteriorated, with rising unemployment and poverty rates. The West Bank's economy is on the brink of collapse, with unemployment rates doubling to 31% and a projected \$2 billion budget deficit.⁵¹

All of these actions are escalatory, because they draw wide international condemnation, undermine regional stability, and invite further responses from regional players as has already been the case.

These Escalations Can Tangibly Harm American & Chinese Interests

Given that American and Chinese interests are both opposed to escalating violence in the Middle East, Israel's behavior as it currently stands directly threatens American national interests.

Middle East Escalation Threatens China's Economic Interests

As previously established, China's economic interests in the Middle East are substantial. Israel's escalatory actions have already hampered the region. To make matters worse, the Chinese economy is particularly vulnerable at this time. China's economic growth has shown signs of deceleration in recent years. In 2022, the GDP growth rate was 2.99%, a significant decline from 8.45% in 2021. Although there was a rebound to 5.20% in 2023, the economy still faces challenges.⁵² The export sector has also experienced setbacks. In 2023, Chinese exports totaled \$3.38 trillion, marking a 4.6% decrease compared to the previous year—the first annual decline since 2016.⁵³

This is not directly attributable to the Middle East situation, but with such a large stake in the Middle East, it is clear that further escalations will have strong negative results for the Chinese economy. Disruptions in key maritime routes have historically led to increased shipping costs, adversely affecting China's manufacturing sector. For instance, recent turmoil in the Red Sea due to the deteriorating regional security situation has already resulted in shipping costs rising by up to 250%, significantly impacting exporters such as China.⁵⁴ Such disruptions can erode profit margins for Chinese manufacturers, leading to production slowdowns and reduced export competitiveness.

China's financial strain has been exacerbated by the need to write off substantial losses on certain BRI projects around the world. For instance, the rail line between Djibouti and Ethiopia performed so poorly that China was compelled to write off a billion dollars in losses.⁵⁵ Similarly, the \$5.5 billion Jakarta-Bandung high-speed train line in Indonesia required two government-funded bailouts and is projected to take 40 years to break even, double the initial estimates.⁵⁵ As of 2023, the debt owed by low- and middle-income countries to China ranged between \$1.1 trillion and \$1.5 trillion, with 80% of China's loan portfolio in countries experiencing financial difficulties.⁵⁶ Notably, 58% of Chinese loans were allocated to bailouts, totaling \$240 billion for 22 developing countries between 2008 and 2021.⁵⁷ The growing number of defaults and the substantial sums extended in bailouts indicate significant financial exposure for China.

Obviously, Middle Eastern regional stability is more conducive to economic recovery for China and improved BRI performance than otherwise. Widespread conflicts would likely prompt regional players like Iraq to focus limited funds on security efforts, harming not just trade that flows through critical routes in the MENA area but also Chinese returns on local BRI investments which have seen the most allocation in the Middle East than in any other region.

A Stable, Peaceful Middle East is in China's Diplomatic Interests- and Xi's

Beyond economic and security concerns, Middle Eastern unrest undermines China's strategic diplomatic efforts. China's diplomatic efforts also hold economic and political consequences due to ideological and philosophical lenses through which the Chinese Communist Party views itself and its subjects. The CCP derives significant authority from its ability to project China as a global peace broker and superior engine for prosperity and stability, reinforcing its governance model and ideological stance.⁵⁸ This has been referred to as "performance legitimacy", where the tenuous grip on power is only permitted by consent of the governed insofar as prosperity is managed appropriately.⁵⁹ There have been attempts to renegotiate this unspoken contract, such as the 1989 Tiananmen massacre or the hundreds of

COVID-19 riots and protests.⁶⁰ While foreign affairs have never directly caused any of these outbursts, the Chinese government understands that foreign affairs and the psychological impact that foreign policy has on perceptions of performance legitimacy among the governed are not negligible factors in the power calculus.⁶¹

In the Middle Eastern arena, China has positioned itself as a mediator and stabilizing force in the region, as evidenced by its role in brokering the 2023 Saudi-Iran rapprochement.⁶² However, continued conflict—especially if perceived as driven or supported by U.S. actions—contradicts China’s efforts to present itself as an effective and neutral peace broker. This threatens its international and domestic image, and therefore the legitimacy of the efforts of the CCP. The latest Central Economic Work Conference (a national meeting that sets the annual Chinese economic agenda) report has stated the CCP recognizes potential economic fallout from failure to successfully mediate peace abroad with an explicit focus: “on expanding domestic demand... [and] restoring and expanding consumption” by “increasing the income of urban and rural residents through multiple channels.”⁶³ According to these reports, the CCP hopes to achieve this by enhancing consumer sentiment and confidence in both the CCP and its market approaches via “improving psychological expectations in society and boosting confidence in development.”⁶⁴ In short, as the CCP secures commercial and diplomatic objectives abroad, this boosts much needed confidence in the government at home, which hopefully creates a positive feedback loop of enablement and recovery.

The Xi administration is certainly mindful of the interrelationship between foreign affairs and implications they hold for domestic stability and tranquility, because their decisions are framed within a broader political and ideological lens.⁶⁴ The regime’s principal interests remain centered on consolidation of political, military, technological power; and in entrenching or enhancing national unity, such as over the island of Taiwan.

If China repeatedly fails to negotiate peace and play a constructive role in key foreign dynamics such as various relations between key Middle Eastern players, there will be psychological, economical, and therefore political repercussions at home, regardless of the

real material connection between these diplomatic endeavors and the physical status of the government.

This is something China cannot ignore. In fact, one of the key drivers for China’s foreign policy initiatives is a form of confirmation bias: seeking political validation and power at home by testing itself abroad. As put by David Shullman, former Deputy National Intelligence Officer for East Asia at the National Intelligence Council (NIC) in the Office of the Director of National Intelligence (ODNI), Beijing’s initiatives are aimed at “shaping the information space... to China’s advantage” in ways that head off criticism and block off challenges to the Party ideology. Their foreign goals are to “legitimize the Party and China’s authoritarian system on the global stage.”⁶⁵

While Israel’s escalatory actions are removed several degrees from the legitimacy of the Xi administration, it is safe to say that they threaten Chinese diplomatic and economic efforts. The failure of these efforts in brokering peace and ushering in development through BRI and other projects would most certainly contribute to well-documented social tensions and fracturing of public positive sentiment towards the ruling class.⁶⁶ This could play a hand in precipitating real problems pertaining to social unrest, the rule of law, and ability to sustain projects like the BRI. While this is nowhere near the sensitivity and scale of legitimacy that surrounds other concerns closer to home like Taiwan and the South China Sea, Israel’s actions still can have a non-negligible effect. It is in this sense that Israel’s actions, if they continue to be disruptive enough, can harm interests adjacent to existential concerns for China.

In terms of China’s counterterrorism interests, following the fall of the Assad regime, the Turkistan Islamic Party has sent signals that it is shifting its focus. The TIP is composed primarily of Uyghurs who hold a strong interest in targeting China due to aforementioned oppression of Muslim Uyghurs going as far back as 2009, but were preoccupied first with establishing operations in Syria. This consumed a great deal of operational bandwidth. The TIP took part in the six-day push that ultimately toppled Assad’s regime which has now released countless weapons into the wild. A statement issued from the TIP targeted China, vowing “With the permission of God, his

power and strength, the Chinese infidels will soon taste the same torment that the infidels in the Levant tasted.”⁶⁷ Israel’s targeting of Iran and Iranian officials within Syria itself played a key role in weakening support for Assad, and as such Israel’s escalations directly share responsibility for the potential terrorism proliferation situation China is facing.⁶⁸

Despite Escalations And Risks, America Draws No Clear Red Lines

US Aid to Israel is Violating US Law

Since the onset of the Gaza conflict in October 2023, the United States has significantly increased its military assistance to Israel, reaffirming what appears to be unwavering support even in the face of escalatory actions. The United States has repeatedly issued stern warnings to Israel about its conduct in Gaza and elsewhere. For example, the U.S. Agency for International Development (USAID) and the State Department’s Bureau of Population, Refugees, and Migration concluded Israel was blocking humanitarian aid and should have weapon shipments stopped under Section 620(i) of the Foreign Assistance Act. This provision requires the government to cut off military aid to any country found blocking humanitarian efforts.⁶⁹ U.S. officials made clear their demands that Israel improve the humanitarian situation, and these demands were not met.

This prompted an official letter from Secretary of State Antony Blinken and Secretary of Defense Lloyd J. Austin III, condemning Israel’s actions.⁷⁰ But the Biden Administration did not halt weapons shipments. President Joe Biden personally instructed Netanyahu’s administration to refrain from invading Lebanon, as well as Rafah but these instructions were obviously ignored.⁷¹ And support has continued, virtually unfettered. In fact, the United States provided a substantial boost in military presence, financial aid, and arms sales, with reports indicating that U.S. material aid to Israel has quadrupled since the start of the war. Between October 2023 and September 2024, the United States provided approximately \$6.8 billion in FMF.⁷²

In November 2024, the Biden Administration notified Congress of a planned \$680 million arms sale to

Israel. This package included advanced munitions such as Joint Direct Attack Munition (JDAM) kits, which convert unguided bombs into precision-guided munitions, and 615 small-diameter bombs designed to minimize collateral damage.⁷³

Trade-Offs Between Theaters

On a near daily basis, the United States has sent weapons shipments to Israel, culminating in tens of thousands of tons of weapons deliveries.⁷⁴ One significant deployment is the Terminal High Altitude Area Defense (THAAD) system, an advanced missile defense platform designed to intercept ballistic missiles during their terminal phase.⁷⁵ There are only seven of these batteries in the U.S. arsenal.⁷⁶ And with concerns mounting about China’s missile capabilities potentially overwhelming U.S. and allied missile defense systems in the East Asia-Pacific region, sending a much-needed THAAD battery to aid Israel’s already impressive defense capabilities seems needlessly performative.⁷⁶

Israel has already successfully rebuffed several missile attacks, the most recent one from Iran being the largest of its kind in history, involving 200 ballistic missiles but resulting in zero fatalities.⁷⁷ Israel has some of the best layered missile defense technology in the world, including tried-and-true systems such as the Iron Dome, the David’s Sling (formerly Magic Wand), the Arrow and Patriot systems, and the naval oriented C-Dome.

Meanwhile, China has developed a diverse and sophisticated missile arsenal, including the Dongfeng (DF) series, capable of striking targets across the Western Pacific. Notably, the DF-27 ballistic missile is assessed to have a “high probability” of penetrating U.S. ballistic missile defense systems.⁷⁸ Chinese military doctrine emphasizes the use of large-scale missile salvos to saturate and overwhelm enemy defenses. Such “missile swarms” could potentially exhaust the existing intercept capabilities of U.S. and allied missile defense systems, rendering them ineffective in the face of a concentrated attack.⁷⁹ Analysts suggest that, in the event of a conflict over Taiwan, China might consider preemptive missile strikes against U.S. military bases in the region, such as those in Guam, Okinawa, and other locations within

the first and second island chains.⁸⁰

The objective would be to incapacitate U.S. forces before they can effectively respond to an invasion of Taiwan.⁸¹ U.S. missile defense systems, including Aegis-equipped ships and land-based interceptors, may struggle to cope with the sheer volume of missiles deployed in a Chinese preemptive strike.⁸² The capacity to intercept multiple incoming targets simultaneously is finite, and a well-coordinated barrage could exceed these limits.^{83,84} As such, a second THAAD battery outside of the one already in operation in Guam would be a valuable addition to existing defenses. Instead, it is going to an ally that is already well defended.

The USS Gerald R. Ford Carrier Strike Group was also diverted from the critical East Asia Pacific theater to the Middle East region to show support for Israel, even personally aiding in air defense.⁸⁵ The United States also positioned advanced fighter aircraft, including F-22 Raptors, in the Middle East to show willingness to back Israel directly.⁸⁶

These are all much needed resources and weapons that could be deployed in significantly more vulnerable theaters, against more powerful enemies, but are instead going to an ally who has disregarded American interests by exhibiting sustained escalatory behaviors. These allocations, therefore, are less than ideal.

China & Others Hold America Accountable, React Accordingly

The View from Beijing

Historically, U.S. support for Israel was rooted in the strategic interests of both nations during the Cold War, where Israel served as a counterweight to Soviet influence in the Middle East.⁸⁷ However, in the post-Cold War era, this relationship has taken on new dimensions, particularly in how it shapes the Sino-American rivalry. Unwavering support for Israel, including military aid and diplomatic protection, has been perceived by China as part of a broader strategy to maintain hegemony, especially in regions close to Chinese interests.⁸⁸ It has been viewed almost entirely as a destabilizing influence, aimed at destroying peace at the costs of all involved rather than promoting

harmony for its own interests and the interests of its allies.⁸⁹

As China's permanent representative to the UN stated at the UN Security Council briefing in October 2024, "The situation in Gaza is not showing any sign of stabilization, but has continued to deteriorate. In the past two weeks, Israel has not relented its military operations... It needs to be pointed out that, according to reports, since last October, the US has provided Israel with more than 17 billion U.S. dollars worth of military aids. Under the current circumstances, does such a large scale supply of weapons help realize the objectives of Security Council resolutions?... Israel must stop eroding and jeopardizing the foundations of the two-State solution and return to the right track of the two-State solution. China is ready to continue to play a constructive role and make unremitting efforts to end the fighting as soon as possible and realize peace in the region."⁹⁰

As mentioned previously, Israel's actions are of varied concern to China. But China sees Israel's actions as facilitated by American support. If American support of Israel led to greater regional disruption and war, because of the link between China's significant investments in the Middle East and its own political legitimacy, this would be seen by Chinese officials as nothing short of America deliberately damaging hopes of Sino-American reconciliation and detente.

These results fuel what is called the "Sino-American rivalry narrative".⁹¹ This narrative posits that China and the United States are irreconcilable enemies that must compete against one another in a zero-sum game of influence. From the Chinese perspective, it portrays America as reckless, and further encourages China to align with adversaries like Iran and Russia, forming anti-Western voting blocs within the UN and precipitating international forums for collaboration outside of U.S. direct authority.⁹² This realignment is evident through increased economic partnerships, military cooperation, and participation in multilateral organizations like BRICS and the Shanghai Cooperation Organization (SCO).^{93,94}

US Support for Israel is Driving US Adversaries to Collaborate

In response to U.S. policies favoring Israel and the imposition of sanctions, Iran has deepened its economic ties with China. In the first half of 2024, non-oil trade between the two nations reached \$15.7 billion, with Iran exporting \$7.2 billion worth of goods to China and importing \$8.5 billion.⁹⁵ Additionally, a 25-year strategic cooperation agreement signed in March 2021 aims to boost bilateral trade to \$600 billion over a decade, granting China priority access to investments in Iranian infrastructure, banking, and communications.⁹⁶

Iran and China have also expanded their military collaboration. Joint naval exercises involving Iran, China, and Russia signal a shift towards greater military cooperation, serving as a direct response to the U.S.'s military presence and alliances in the Middle East. Iran has also sought advanced weaponry and technology transfers from China to bolster its defense capabilities, particularly as U.S. military aid enhances Israel's regional strength.⁹⁷

Iran's pivot towards China is further reflected in its engagement with multilateral organizations. Its full membership in the SCO, led by China and Russia, underscores a commitment to fostering Eastern alliances as a counterbalance to U.S. dominance in the region. Moreover, Iran's interest in joining BRICS aligns with its strategy to counter U.S. sanctions and reduce economic isolation by integrating into a bloc that promotes multipolarity in global governance.⁹⁸ This realignment challenges U.S. economic and diplomatic influence. The BRICS bloc's share of global GDP has grown from 11% in 1990 to almost 30% by 2014, enhancing its role in shaping global economic policies and challenging Western-led institutions like the International Monetary Fund and the World Bank.⁹⁹ Efforts by BRICS to create alternative financial systems, including discussions about establishing a new reserve currency, represent a direct challenge to the U.S. dollar's dominance, potentially undermining America's economic leverage.¹⁰⁰

In fact, after BRICS added five new members earlier in the year of 2024, President Xi Jinping remarked on an October visit to the Russian city of Kazan in October of 2024 that the bloc planned to soon invite more "partner countries" to join. He stated: "Under the current circumstances, the urgency of reforming the

international financial architecture is prominent."¹⁰¹ He also stated "The BRICS countries should play a leading role, deepen financial cooperation, promote the interconnection of financial infrastructure, maintain high-level financial security, expand and strengthen the New Development Bank, and promote the international financial system to better reflect changes in the world economic landscape."¹⁰¹

Diplomatically, collaboration within BRICS has impacted voting dynamics at the United Nations, often countering U.S. positions. An illustrative instance of a voting bloc comprising China, Russia, and Iran opposing U.S. initiatives within the United Nations occurred in August 2020. The United States proposed a resolution to extend the arms embargo on Iran, which was set to expire in October 2020 under the terms of the Joint Comprehensive Plan of Action (JCPOA). The resolution was met with significant opposition: China and Russia voted against it, while Iran, though not a Security Council member, lobbied against the extension. The proposal failed to pass, with only two votes in favor (the U.S. and the Dominican Republic), two against (China and Russia).¹⁰²

In summary, U.S. support for Israel has inadvertently played a role in driving Iran and other enemies of the U.S. to strengthen alliances with China, and China has been more than willing to accept these approaches because of the overwhelming perception that the U.S. is uninterested in any version of detente, even at its own expense.^{103,104}

America Should Curb Israel's Enthusiasm

Unwavering U.S. support for Israel has historically safeguarded an ally in the Middle East but now risks destabilizing the region by enabling escalatory actions by the IDF. These actions, including strikes on Iran and the occupation of Lebanese territories, threaten not only U.S. regional interests—such as oil production and counterterrorism—but also undermine Chinese initiatives like the BRI and diplomatic endeavors with potentially far-reaching domestic repercussions. The fallout from such policies fuels Sino-American rivalry by portraying Washington as reckless on the world stage and incentivizes adversarial alignments between China and nations like Iran, influencing UN voting patterns and economic partnerships.

To mitigate these risks and preserve its geopolitical standing, the United States must implement clear red lines to govern Israel's actions and signal that it is a responsible world leader. These policies not only protect U.S. national interests but also strengthen its ability to maintain diplomatic credibility with China and other international stakeholders. Historical precedent underscores the necessity of these measures:

1. Restricting West Bank Settlements and Annexation:
 - Historical Justification: The expansion of settlements has repeatedly undermined peace processes, such as during the aftermath of the Oslo Accords (1993). Continued U.S. support without restrictions emboldens actions that provoke international backlash and destabilize negotiations.
2. Prohibiting Direct Strikes on Iran:
 - Historical Justification: Israeli strikes on Iranian assets, such as the 1981 Osirak reactor bombing, escalated regional tensions and complicated U.S. relations with Arab states. Preventing further strikes can avoid exacerbating hostilities with Iran and potentially other regional players.
3. Maintaining Temple Mount Policies:
 - Historical Justification: Changes to the status quo on the Temple Mount, particularly during Ariel Sharon's visit in 2000, have directly led to widespread violence, including the Second Intifada. U.S. efforts to enforce this red line would reduce flashpoints for conflict that undermine broader stability.
4. Limiting IDF Occupation in Lebanon:
 - Historical Justification: The prolonged Israeli occupation of southern Lebanon (1982–2000) fueled the rise of Hezbollah, which became a significant regional threat and undermined U.S. counterterrorism efforts. By capping the duration of any future IDF presence, the United States can prevent repeating this cycle.

Policy Mechanisms

To enforce these red lines, the United States should adopt clear consequences for Israeli overreach. Historical lessons justify each policy mechanism:

1. Sanctions on West Bank Settlers: Targeted sanctions against settlers tied to provocative actions align with strategies used in other contexts, such as sanctions on Russian oligarchs following the annexation of Crimea in 2014. These measures create accountability without undermining broader diplomatic relations.
2. Withdrawal of U.S. Middle East Forces: The repositioning of U.S. fleets during the 1973 Yom Kippur War served as a signal of restraint to avoid escalation. A similar tactic today could reinforce U.S. commitments to regional stability while maintaining its strategic deterrent capabilities.
3. Restrictions on Military Assistance: Historically, delays in U.S. military aid—such as suspending cluster munition shipments during the 1982 Lebanon War—have successfully signaled disapproval without severing alliances. Limiting critical military platforms like the F-35 or JDAMs would create incentives for Israeli compliance.
4. Loan Cost Adjustments: By adjusting the terms of international loan guarantees, as seen in the early 2000s during disputes over settlement expansion, the United States can use economic levers to influence Israeli policy without undermining security cooperation.

Conclusion

The U.S. government's *carte blanche* support of Israel does not serve the broader strategic interests of either Washington or its global partners, including China. This policy enables escalatory behavior by Israel, which threatens to further destabilize the Middle East, endangering core U.S. national interests. These encompass stable oil flow, counterterrorism, and nuclear non-proliferation. Similarly, it jeopardizes China's energy investments and BRI projects in the region, creating a direct conflict of interests.

By fostering regional instability, U.S. policy inadvertently deepens the narrative of Sino-American rivalry, portraying itself as reckless and dismissive of global consequences. This dynamic further entrenches hostility in U.S.-China relations, freezing opportunities for collaboration on critical global challenges including rising tensions around the Taiwan Strait and South China Sea.

The United States faces a pivotal moment in its Middle East policy. By implementing these measures, Washington can align its support for Israel with its broader strategic interests, including stability in the Middle East and improving relations with China. Failure to act risks exacerbating regional conflicts, weakening U.S. diplomatic credibility, and widening the magnitude of an emerging second Cold War. To mitigate these risks, U.S. policymakers must reevaluate America's unconditional support for Israel, redefine its core strategic objectives in the Middle East, and adopt policies that prioritize stability and diplomacy over militarized solutions. Only by recalibrating its approach can the United States protect its own interests, reduce the likelihood of broader geopolitical fallout, and contribute to a more balanced and cooperative global order.

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