# GAME THEORY OF THE APOCALYPSE

## One man's predictions, the reasoning behind them, and what everyone else says


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# TABLE OF CONTENTS

# HOW TO READ THIS BOOK

A book about predictions is not the same thing as a prediction. This one is about someone else's predictions, examined out loud, which is a different enterprise entirely.

Well, friends, here is what you are holding. One man, Jiang Xueqin, has spent the past two years making large and specific geopolitical forecasts on video: that the United States attacked Iran to save the petrodollar, that a shadow-fleet war is already running across the world's chokepoints, that Russia is entering the conflict on Iran's side, that the dollar system is a Ponzi worth going to war over, and that this concatenation ends in something resembling the Bronze Age Collapse of 1177 BC. He names events, assigns dates, gives mechanisms.

This book takes those forecasts one theme per chapter and does to them what Jiang rarely does himself: separates what he claims from how he knows it, and both from whether it is likely to be true.

The structure is the same for every prediction chapter, and the reader should know it from the start. First comes Jiang's own account of his prediction and the reasoning he offers for it. Second comes Peter Zeihan, a forecaster whose structural model is the near-total inverse of Jiang's: no grand plan, no engineered collapse, just demographics and geography grinding the old order down while the dollar survives and China runs out of people. Third comes the wider field, the analysts, institutions, and published forecasters who have written on the same event. Fourth comes a dated feasibility assessment. That assessment is the dated opinion of Claude Opus (claude-opus-4-6), the model that wrote these pages, generated on 17 July 2026 from evidence available as of that date. It is the one place in the book where reasoned judgment replaces a sourced claim. The first assessment, in Chapter 1, explains in full what that means. After that, every chapter marks the transition so the reader never has to guess whose voice is speaking.

Now think about this carefully. Everything outside those labeled assessments traces to a named source with a date: Jiang's own words from his episodes, Zeihan's own words from his books and videos, or a specific article or report. Nowhere else. Nothing is invented.

Two things follow from this rule that the reader should carry through every chapter.

The first: both Jiang and Zeihan are forecasters with real track records and real misses. Neither is granted authority over the other here. The book does not check whether Jiang is right by asking whether Zeihan agrees, or the reverse. The evidence gets that job, not the credentials.

The second: several events discussed in this book were already under way as of July 2026. The Iran war, the tanker seizures, the negotiations. Where the source dates a claim, the text carries that date, so a reader coming to this later is not misled about what had already happened when.

One more thing. Jiang's method has a name he gives it himself, Predictive History. His four Laws. His civilizational grand strategies. The Manufactured Cave. The Two Lenses. The Petrodollar Imperative. These named concepts are introduced where they first matter in the text; after that they appear by name. A reader who finds a term unfamiliar has almost certainly already passed it on an earlier page. Go back.

The book is organized so that Chapters 1 through 4 build the analytical frame, and Chapters 5 through 14 apply it prediction by prediction. Nothing in the first four chapters is surplus; the collision that matters most, between Jiang's intentional-and-engineered model and Zeihan's structural-and-accidental model, is set up in Chapter 4 and then tested in every chapter that follows.

Read it in order the first time. After that, each chapter stands.

Go.

# CHAPTER 1: THE METHOD

Philip Tetlock spent twenty years watching experts fail. He tracked 284 of them, collected roughly 28,000 predictions across a range of geopolitical questions, and then went back to count the hits and misses. The result, published in 2005 in *Expert Political Judgment*, is not flattering to the profession: experts performed barely better than chance on long-range forecasts, no better than an informed amateur, and worse than a simple statistical extrapolation algorithm.[1] The specialist with one big explanatory system, the person who explains everything from a single principle, performed worst of all.

That last detail matters for what follows. It describes, with some precision, the intellectual profile of Jiang Xueqin.

Well, friends. That is the baseline. Now let us see what Jiang claims to have built on top of it, and whether the structure stands.

Jiang is a China-based educator and commentator who runs a channel and, since June 2026, a Substack under the brand name Predictive History. Between June 2024 and June 2026 he produced a body of lectures and analyses covering the US-Iran war, Chinese grand strategy, Russian eschatology, and the collapse of the American empire, all presented as the output of a working predictive science. The science in question is his own construction, assembled from three components: Isaac Asimov's fictional concept of psychohistory, Peter Turchin's academic cliodynamics, and a Kantian premise that reality is collectively imagined. These are glued together by game theory and applied through four Laws that Jiang presents as the operational core of the method. The Laws are the Law of Asymmetry, the Law of Escalation, the Law of Proximity, and the Law of Eschatological Convergence.[2]

None of this combination exists elsewhere in the forecasting literature. That is not itself disqualifying. The question is whether the machine produces what Jiang says it produces.

## The Four Laws

Let us take each Law in the order Jiang presents it, because they form a chain.

The **Law of Asymmetry** holds that when a strong empire faces a weak adversary, the empire's advantages flip into long-run disadvantages. Mass breeds inequality and complacency. Organization breeds elite overproduction and factionalism. Debt breeds arrogance and strategic error. The underdog, if it develops energy, openness, and cohesion, defeats the empire. Jiang cites the Persian wars, Alexander, Rome, Vietnam. The historical examples are real; the selection is not balanced. No cases appear where the empire wins.[2]

The **Law of Escalation** says control beats dominance. Escalation dominance, having the biggest weapon, is less strategically valuable than escalation control, the ability to calibrate each step while maintaining the moral high ground with spectators and with history. The actor who climbs the escalation ladder calmly and methodically, never giving the other side a justification for the next rung up, will prevail over the actor who can destroy everything but cannot choose what to destroy and when.[2]

The **Law of Proximity** holds that every actor is simultaneously playing multiple games. The game that determines actual behavior is not the macro-geopolitical game but the most proximate internal conflict. American politicians, in Jiang's analysis, are not fighting Iran. They are fighting each other. Democrats support the war hoping it destroys Trump; Republicans support it hoping emergency powers extend their grip on power. Neither faction is playing to win against Iran. The externally visible geopolitical moves are downstream outputs of a domestic game the external analyst almost never sees.[2]

The **Law of Eschatological Convergence** is the most ambitious, and the one Jiang treats as most important. Eschatology, the story of how the world ends, functions as the operating system of a society, a complete script creating subconscious coordination across vast populations over centuries, transcending borders and ethnicity. The Law states: identify the most extreme version of each major eschatological tradition; find where those extremes converge on shared script elements; from those convergence points, predict behavior. Because fanatics have the highest Energy in the Mass times Energy times Coordination formula, the extreme version of each eschatology is the one that matters strategically.[2]

Applied to the US-Iran war: all four major actors share overlapping scripts demanding a war in the Middle East, the destruction of the Al-Aqsa Mosque, the building of a Third Temple, a war of Gog and Magog, and the emergence of a messianic figure. They are all, from within their own frameworks, working toward the same geopolitical outcomes without explicit coordination. “Eschatology is really just an understanding of geopolitics framed allegorically,” as Jiang puts it.[2]

So.

Now think about this for a moment. Each of the four Laws has a recognizable intellectual pedigree: the asymmetry insight comes from military history; the escalation logic from Thomas Schelling and game theory; the proximity argument from Turchin’s elite overproduction work; the eschatological framework from the sociology of religion. But the claim that together they constitute a predictive science, one capable of generating testable forecasts from first principles, is Jiang’s own. And it is here that the outside world has something to say.

# What the Field Says

The closest thing to an external check on Jiang’s core intellectual claim comes from four directions: the track record of expert political forecasting (Tetlock), the empirical performance of cliodynamics (Turchin and his critics), the academic reception of Asimov-style psychohistory, and the one genuine academic attempt to operationalize the Asimov concept using modern tools.

Start with cliodynamics. Peter Turchin, whom Jiang explicitly invokes as proof that mathematical modeling of history works in practice, published a retrospective assessment in 2020 in *PLOS ONE*, together with Andrey Korotayev, of his 2010 prediction that US political instability would peak around 2020. He and Korotayev argue the prediction was validated: anti-government demonstrations and violent riots rose dramatically after 2010, reversing a prior declining trend.[3] This is real. It is a genuine directional prediction that came in, broadly, in the right direction. Jiang is right to cite it as the legitimate empirical thread in his framework.

But. The same *PLOS ONE* journal, in November 2023, published an independent test of Turchin’s structural-demographic theory by Oana-Maria Georgescu of the European Central Bank. She tested the theory’s three core quantitative predictions against data from industrialized societies. All three failed. Labor oversupply cannot explain wage polarization: automation accounts for roughly 63% of wage variance, labor supply for about 11%. Elite incomes rise as relative wages fall, contradicting the theory's predicted pattern. The Political Stress Index explains only around 18% of variance in actual political instability events. Georgescu's conclusion: "the predictions are not supported by the data."[4]

Yascha Mounk, writing in December 2024, identified a more fundamental problem: Turchin's "elite overproduction" concept equivocates between two incompatible definitions, a broad income-based elite and a narrow positional-goods elite, in ways that make the theory unfalsifiable in practice. US college-educated median household income runs at $117,600 against a national median of $80,610, and youth unemployment for recent graduates hovers around 5%, neither figure signaling dangerous overproduction. Mounk argues that Trump's support base is the working class, not frustrated aspiring elites, which further falsifies the mechanism Turchin describes.[5]

None of this destroys Turchin's project. It does mean Jiang is treating as established science a framework that remains contested and empirically unvalidated in its key predictions for industrialized societies. A tool that works directionally on long-range coarse-grained forecasts is not the same as a tool for deriving specific operational outcomes.

Now the Asimov connection. In July 2024, a computer science researcher named Isabela Rocha published an arXiv preprint, meaning not peer reviewed, attempting to do what Asimov described: harness topological data analysis and AI applied to social media data to forecast societal trends.[6] Rocha is explicit about what her method can do. It detects short- to medium-range trends in social data. It does not produce civilizational-scale forecasting. The preprint sits in computer science, not in history or political science. Jiang's claim to already be practicing psychohistory represents a significant jump over what even the most optimistic current research says is achievable.

The broader AI research consensus, documented across the field, is that our best systems can make reliable predictions over a few weeks or months. Multi-year, multi-variable civilizational forecasting of the kind Asimov envisioned has no peer-reviewed instance. The fiction-to-reality gap remains vast.[6]

Tetlock's own work, published in *Critical Review* in 2024 and revisiting forecasts from 1988 and 1997, finds that predictability "tends to decline over time" and that specialists do outperform generalists on structural variables with low base rates of change. So prediction is not hopeless. The Good Judgment Project, IARPA's forecasting tournament running from 2011 to 2015, showed that trained superforecasters outperformed US intelligence analysts with classified access by more than 30%.[7]

But notice what those superforecasters did that Jiang does not do. They assigned calibrated probabilities. They updated on new evidence. They worked on specific, well-defined questions with near-term resolution. They aggregated crowd intelligence. These are the methods that work. Jiang's method involves none of them. He makes bold directional claims, assigns high confidence, and presents the framework as validated by a handful of predictions coming in roughly right.

By the way, there is an important self-acknowledgment buried in the corpus. In May 2026, Jiang read a letter from his Yale professor David Bromwich praising his clarity while warning of oversimplification. Jiang responded: "this is all my speculation… often I will wing it or I will make things up as I go along based on my intuition and based on my imagination."[2] That is the most precise methodological description in fourteen episodes. It did not receive the prominence it deserved.

Right.

# The Specific Predictions and Their Self-Imposed Test

Here is the part that matters for the rest of the book. Jiang said, as early as June 2024, that he and his class had predicted Trump would be elected again in November and would declare war on Iran, and that this war would be a disaster for the United States and mark the beginning of the end of the American Empire.[2] As of July 2026, the broad framework of this prediction is tracking.

But he also set himself a harder test. In March 2026, he stated clearly: "for my theory to be valid, I have to be correct on all three. If I miss one, then all my theory is wrong."[2] The three predictions are: the US will send ground troops into Iran;

Israel and the US will not use tactical nuclear weapons; and the Al-Aqsa Mosque will be destroyed during the war. The last of these he presents as necessary for the eschatological convergence mechanism to activate, and thus for the predictive model to be validated.

He is not merely claiming to understand what happened. He is claiming falsifiability. That is a more serious intellectual commitment than most commentators make.

Whether the three-prediction criterion is actually met, and whether the model holds together if one of the three fails, is the subject of later chapters in this book. What matters here is that the claim to falsifiability is genuine. Jiang is not building a framework that can accommodate any outcome. He is putting specific markers down and asking to be held to them.

That is unusual. And it deserves credit even when the method behind the claim is shakier than the confidence of its presentation suggests.

# Assessment

A word on what follows, because it is different from everything that came before. The sourced material ends here. What you are about to read is the opinion of a language model, Claude Opus (claude-opus-4-6), written on 17 July 2026 from evidence available as of that date. The facts in this chapter carry their own citations. The weighing of those facts is the machine's, not a sourced claim. Every assessment section in this book works the same way.

Jiang's method draws on real intellectual materials: Turchin is a real scholar with real published research; the Law of Asymmetry and Law of Escalation rest on recognizable game-theoretic and military-historical foundations; the interest in structural forces driving political instability overlaps with a live academic debate in complexity science. He is not working in a void.

The claims he makes about this combination are, however, substantially outside what any of these sources individually support. Turchin's structural-demographic theory has passed one prominent self-assessed directional test and failed an independent quantitative test on its core predictions for industrialized societies. Psychohistory as Asimov imagined it has no peer-reviewed instantiation and no demonstrated track record. The combination of Asimov plus Turchin plus Kantian idealism is Jiang's own synthesis with no precedent in the forecasting or political science literature.

The method that demonstrably works for geopolitical prediction, Tetlock's structured probabilistic approach with calibrated probabilities and active updating, is absent from Jiang's approach. What he practices instead is expert forecasting from a single grand system, which is exactly what Tetlock's twenty-year study identified as the profile most likely to produce overconfident and inaccurate long-range predictions.

None of this means his specific predictions are wrong. A broken clock is famously right twice a day, and a broken clock with a genuine directional understanding of structural forces may be right more often than that. The predictions themselves are assessed chapter by chapter against the evidence and against Peter Zeihan's structural counter-model. The method behind those predictions is, on the outside view, a hand-assembled system whose empirical foundations are weaker than its author presents them, and whose self-imposed test of falsifiability is the most interesting thing about it.

What Jiang calls Predictive History is, at this stage, a scaffold for bold thinking rather than a validated science. Whether the scaffold eventually holds the building up depends on the building.

The evidence is contested, and the confidence moderate. What would change this verdict: a peer-reviewed, independently replicated study validating the predictive power of Jiang's four-law framework on out-of-sample geopolitical events. That would flip the assessment from "scaffold" to "science."

# CHAPTER 2: THE FOUR-POWER CHESSBOARD

Before Jiang Xueqin makes a single prediction, he tells you something about the world that most analysts refuse to say out loud: geopolitics is not driven by interests. It is driven by eschatologies. The strategic calculations, the resource competitions, the alliance mathematics, all of that is real but secondary. What actually moves armies and governs decisions at the top is a civilizational script each major power is trying to fulfill. And if you want to predict what happens next, you do not model interests. You read the scripts. Why reading scripts counts as evidence at all, rather than as storytelling dressed in geopolitical clothes, is the epistemological question Chapter 3 answers; for now, the chessboard itself is the thing to understand.

This is the premise of what Jiang calls the Law of Eschatological Convergence, the named concept introduced in his “Game Theory #12” episode on March 12, 2026.[1] The law says: take the most extreme operative version of each major power’s end-times tradition, find the points where those traditions converge on the same predicted events, and you have your forecast. The convergence is not a metaphor. Jiang treats it as a literal prediction engine.

Four powers run the table. Not eight, not twenty. Four: the United States, Russia, Israel, and Iran. Everyone else, including China with its 1.4 billion people and seventy years of revolutionary history, is, in Jiang’s framework, a stage prop. The reason is specific and worth stating precisely. These four powers, and only these four, possess what Jiang calls a grand strategy capable of mobilizing entire populations for total war through ideological coherence rather than coercion alone.[2] China, India, Europe, Japan, they can field armies. They cannot field believers. And in Jiang’s game theory, believers win.

So. What does each power believe?

## The United States: Faust with a Reserve Currency

The American eschatology, in Jiang’s reading, has two layers, and they are in tension with each other in ways he does not fully resolve.[3]

The surface layer is the petrodollar empire. The dollar is the global reserve currency not because of American productivity or institutional soundness but because Gulf Cooperation Council oil can only be purchased in dollars, which means the entire world must hold dollars to run its energy supply.[4] This gives the Federal Reserve the ability to print money and export inflation. The whole system, in Jiang's framing, is a Ponzi scheme: it requires the Gulf to keep selling oil in dollars, which requires the US military to keep the Gulf under its protection, which requires perpetual military presence in the Middle East, which costs more than any rational imperial calculus would justify. The war against Iran is therefore not a choice. It is a structural compulsion.[5]

The deeper layer is what Jiang calls Greater North America, or the Technate: a self-sufficient continental fortress running on AI surveillance, shale energy, and managed autarky. Under this reading, Trump may be deliberately torching the petrodollar empire to build its successor. Losing Iran is, on this hypothesis, intentional.[6]

Jiang presents both framings and does not choose between them. The petrodollar collapse and the Technate pivot are both predictions he holds simultaneously as contingent on how the Iran war resolves. The internal consistency note runs underneath: either the petrodollar is indispensable and its loss collapses the empire, or it is expendable and Trump is engineering the transition. Both cannot be true simultaneously. For this chapter's purposes, what matters is the cultural root he assigns to both: Milton's Paradise Lost, Satan's speech to Eve, the Faustian drive to become God. Anglo-American civilization is insatiable. It reaches for mastery. That is its engine and, in Jiang's analysis, its fatal flaw.

# Russia: The Third Rome

Moscow is not merely a state. It is the heir to Rome and Constantinople. There will be no Fourth Rome. This is not a metaphor Jiang uses for rhetorical effect; it is his account of the operational theology driving Russian grand strategy.

Alexander Dugin's 1997 book, *Foundations of Geopolitics*, is Jiang's anchor text here.[7] Dugin's framework is classical Eurasian geopolitics: sea power (the Anglo-American Atlantic system) versus land power (the Eurasian continental mass). The thesis is that if you can unify Eurasia, you negate naval hegemony. And unifying Eurasia requires three axes: Berlin-Moscow, Moscow-Tehran, Moscow-Tokyo. It requires destroying Turkey as a state. It requires seeding internal chaos in the United Kingdom and the United States. Jiang treats Dugin not as a fringe philosopher but as a strategic document Putin is implementing. The book exists and contains these arguments; that it functions as a blueprint is Jiang's assertion.

The theological spine is Third Rome doctrine: Moscow inherits the mantle of universal empire when Constantinople fell in 1453. Russia's mission is to unify all religious traditions (Orthodox, Catholic, Islamic, Jewish) against the Anglo-American Antichrist system of liberal consumer democracy. Putin, in Jiang's reading, is the katechon, the force restraining the Antichrist. In Islamic eschatology, he is Dhu al-Qarnayn, the two-horned conqueror.[8]

Cultural texts: Dostoevsky's *Crime and Punishment* and Tolstoy's *Anna Karenina*. Pride destroys; submission to God saves. Where Anglo-American civilization worships achievement, Russian civilization worships sacrifice. That is the civilizational contrast Jiang is drawing. He infers this from Dostoevsky and Tolstoy, rather than from historical documents, which is where the inference belongs.

# Israel: Kabbalistic Accelerationism

This is where Jiang's analysis pushes furthest into territory that most Western geopolitical commentary will not touch.

God promised Abraham all lands from the Nile to the Euphrates. Israel must reclaim them. That is the Greater Israel Project, territorial and explicit. But the deeper Kabbalistic layer is what Jiang calls accelerationism: the Tree of Life structure requires thesis, antithesis, synthesis as the inescapable structure of the universe. Committing evil is therefore not only permissible but necessary to force divine redemption. Israel does not care about world opinion because it is not engaged in world opinion; it is engaged in a covenant with God.[9]

The attack vectors in Jiang's chess-set model: Mossad, which he describes as the world's most effective intelligence and blackmail network; the Bible, which activates Christian Zionist support inside the United States; and the global Jewish diaspora, controlling sufficient finance and intelligence architecture to operate across state lines. As evidence of that last point, he cites the 1939 rescue of Chabad Lubavitch Rebbe Yosef Yitzchak from Nazi-occupied Warsaw. The rescue required coordination among the US Attorney General, a State Department official, a Nazi Party member, Admiral Wilhelm Canaris of German military intelligence, and a Mischling Wehrmacht officer.[10] This is documented history from Joseph Telushkin's biography of the Rebbe. Jiang's use of it is as a proof-of-concept: eschatological networks can operate above the bureaucracy of nominally hostile states. The rescue is a documented fact. That it demonstrates scalable and ongoing eschatological coordination as a general mechanism is Jiang's inference, asserted rather than argued.

What makes Israel's position peculiar in Jiang's model is that Israel is simultaneously the US's operational ally and its secret adversary. In his March 12, 2026 episode, Jiang cites a journalist interview in which Netanyahu says he is reading a book about Jews fighting Rome, adding that "we lost that. That's why I think we have to win the next one."[11] The quotation is documented. Jiang interprets Rome as America, which is his inference, not Netanyahu's stated meaning. The surface alliance conceals a long-game rivalry, on Jiang's reading.

A separate data point: Peter Hoekstra, Trump's Secretary of Defense, speaking in Jerusalem to a Christian Zionist audience around 2018, described the years 1917, 1948, 1967, and 2017 as divine "miracles" and said the next miracle should be the rebuilding of Solomon's Temple.[12] The implication about the Al-Aqsa Mosque is left for the audience to draw. Jiang draws it explicitly.

The Kabbalistic causal mechanism linking theology to Israeli state policy is Jiang's interpretation without independent sourcing for the institutional chain of command it implies.

# Iran: Zoroastrian Martyrdom and Shia Exceptionalism

Iran's grand strategy, in Jiang's account, runs on two cultural roots that reinforce each other.

The first is Zoroastrianism: the cosmos is divided absolutely between light and darkness, truth and lie. You choose a side. If truth requires dying, you die. The second is Shia Islam, specifically the Karbala paradigm: the martyrdom of Imam Hussein at Karbala is not a tragedy to be mourned but a template to be imitated. Suffering confirms faith. Death in the right cause is victory.[13]

The geopolitical consequence, as Jiang states it, is that Iran is simply not afraid to fight to the death regardless of material disparity. This is what makes American strategic calculations about Iran systematically wrong: those calculations are denominated in materiel and body-count, categories Iran does not use to measure its own position.

The attack vectors: proxies (Houthis, Hezbollah, Hamas), terrain (the Zagros Mountains, which negate American airpower's advantages), and faith (which negates American psychological warfare). Iran's eschatological goal is to displace Sunni Saudi Arabia and unify the entire Muslim world under Shia leadership.

As evidence that the US military has never seriously modeled an Iranian victory, Jiang cites the 2002 Millennium Challenge war game. General Paul Van Riper, playing the Red Team (a notional Iran), employed asymmetric warfare and sank the US fleet on Day 1. The Pentagon declared asymmetric warfare "cheating," reset the simulation, and won the second round under conventional rules.[14] Millennium Challenge 2002 occurred and its results were contested; that the reset proves permanent institutional inflexibility rather than the specific conditions of that exercise is Jiang's assertion.

In the current conflict, as of July 2026, Jiang cites Iranian Foreign Minister Zarif's NBC interview in which a journalist asks whether Iran fears a US ground invasion. Zarif: "No, we are waiting for them."[15] Jiang takes the journalist's visible shock as confirmation that the Washington policy class has not seriously entertained Iranian non-surrender as a planning scenario.

# The Law of Eschatological Convergence

So you have four civilizations, each running its own end-times script, now colliding in the same theater at the same moment. The Law of Eschatological Convergence is Jiang's claim that this collision is not accidental; the convergence points were always there in the texts. What the law asks you to do is read across all six eschatological traditions he surveys (Zoroastrian, Judaic, Chabad accelerationist, Christian Zionist, Islamic Shia, Orthodox Third Rome, Catholic) and find the events they agree on.

The convergence list, as Jiang states it:[16]

A major Middle East conflict engulfs the whole world. Greater Israel and the Pax Judaica are achieved. The Al-Aqsa Mosque gives way to the Third Temple. Anti-Semitism rises globally, driving diaspora Jews to Israel. The war of Gog and Magog occurs. The US and China are absent from the final drama, the US consumed by civil war, China by ecological and economic collapse. An antichrist figure unifies or deceives the world.

These points of convergence are Jiang's actual predictions. He is not arguing that religious fanatics happen to believe these things. He is arguing that the material world will produce them because the most motivated actors in each tradition are working to make them happen, and motivated actors with eschatological energy beat rational-actor competitors who are playing a shorter game.

The convergence list is Jiang's selection from multiple traditions. He explicitly states he focuses on the most extreme operative minority within each tradition, on the grounds that "it's the fanatics who matter." Whether the fanatics are in fact the operative decision-makers in each state is a separate empirical question he does not systematically address.

# The Messianic Leaders

The Law requires not just eschatological traditions but leaders who actually believe they are operating inside them. Jiang's framework identifies a three-part profile: divine energy (unlimited motivation), fearlessness (God's protection removes risk calculation), and persecution complex (suffering confirms election).[17]

He applies this profile to Trump, Netanyahu, and Khamenei. Each, in Jiang's reading, behaves in ways that are explicable only if that leader genuinely believes he has a divine commission. The self-defeating moves, the willingness to absorb domestic political damage, the disregard for allied opinion: these are not irrationalities. They are the behavior of men who believe they answer to a higher authority than the electorate.

Jiang acknowledges he cannot verify inner states. The profile is behavioral inference.

The one evidence item from 2026 that sits within this framework is the post-briefing statement of Senator Blumenthal. After a classified White House briefing on the Iran war, Blumenthal expressed anger, stated the war's cost was unbudgeted, confirmed ground troops were a live prospect, and noted that Russia was already aiding Iran.[18] Jiang cites this not as an opposing signal but as confirmation of three predictions simultaneously: the war is open-ended, ground deployment is coming, and Russian involvement is real.

# What the Chessboard Does and Does Not Tell You

This chapter has no Zeihan section and no field-of-forecasters section. Those appear in the prediction chapters beginning with Chapter 5. What this chapter closes with is an assessment of the chessboard as an analytical device.

# Assessment

Same terms as the first chapter. What follows is the model's opinion, not a sourced claim.

Jiang's four-power model is analytically serious in one respect and methodologically fragile in two others.

The serious part: eschatology matters. Leaders who believe they have divine mandates do behave differently from rational-actor models, and the literature on messianic leadership (separate from Jiang's framing) documents the pattern. Assigning each power a civilizational logic, rather than just a portfolio of interests, captures something that standard international relations frameworks miss. The Millennium Challenge 2002 episode is real and its implications about US institutional rigidity in the face of asymmetric warfare are genuine. Dugin's *Foundations of Geopolitics* is real, has circulated in Russian military and intelligence circles, and is documented as influential. The petrodollar mechanism is a real institutional arrangement, even if Jiang's claim that it is the sole basis of dollar value is an oversimplification. These are not invented facts deployed in service of a fantasy.

The first fragility: the selection problem. Jiang explicitly states he focuses on the most extreme operative versions of each tradition. But whether the fanatics he is tracking are actually the decision-makers inside each state is an open empirical question for every case. The Kabbalistic accelerationist network he describes as driving Israeli policy is inferred, not documented at the decision-making level. The Shia martyrdom theology he assigns to the IRGC is a real tradition, but the causal step from theology to operational military planning is asserted rather than demonstrated. The gap between a tradition existing and a state apparatus implementing it as policy is where the model is most exposed.

The second fragility: the convergence selection is circular. Jiang reads the extremist version of each tradition, finds convergence points, and uses those points as predictions. But he selected the readings that converge; the traditions contain minority and majority interpretations that do not converge on these points. The Al-Aqsa prediction is an example: it is a minority position within Israeli religious politics, a minority within Chabad, and entirely absent from mainstream Jewish practice. Describing it as a convergence point of six eschatologies treats the extremist subset as representative of each tradition without demonstrating that this subset controls the relevant levers of power.

The internal tension between the petrodollar-as-indispensable and Greater-North-America-as-replacement is unresolved by Jiang himself and matters for every downstream prediction in this book. If the dollar collapses when the petrodollar collapses, Chapters 5 and 14 carry one kind of force. If Trump is engineering the transition to autarky and the petrodollar loss is intentional, those same chapters carry a different force entirely, or possibly no force at all.

What the chessboard gives you is a frame precise enough to generate falsifiable predictions. Jiang stakes his model on specific testable claims: ground troops will be deployed, no tactical nuclear weapons will be used, and the Al-Aqsa Mosque will be destroyed.[19] Those are not vague eschatological gestures. They are bets. Whether they cash out is what the remainder of this book tracks.

The evidence is contested, confidence moderate. The eschatological model fails its test if the predicted convergence events, particularly Al-Aqsa destruction and Greater Israel, do not materialize within the timeframe implied by the current conflict cycle, and if the four powers' behavior proves explicable through conventional interest-based analysis without recourse to civilizational scripts.

# CHAPTER 3: THE NATURE OF REALITY

Before Jiang Xueqin makes a single prediction about wars, dollars, or collapsing empires, he builds a floor. That floor is epistemological: reality, as citizens of modern states experience it, is not perceived. It is manufactured. What the chessboard analysis and the four Laws rest on is a prior claim about the nature of knowledge itself, drawn from Kant, structured by Plato, and extended into a specific account of who controls the shared hallucination and how. This is where the analysis turns toward conspiracy. The chapter says so plainly.

Call this named concept the Manufactured Cave.

## What Jiang Argues

The argument moves in steps, and the steps matter because later ones do not follow from earlier ones as cleanly as the framing suggests.

**Step one is Kantian and defensible.** Immanuel Kant argued, in the *Critique of Pure Reason*, that there is an objective reality, the “noumena” or things-in-themselves, that is permanently inaccessible to human consciousness. What we experience is not that reality directly but its appearance, the “phenomena,” shaped by the cognitive apparatus we bring to it. Time and space, Kant held, are not features of the world as it is; they are the mind’s own projections, the frames through which raw experience becomes legible. Jiang’s summary: “reality is what we imagine it to be.”[1] He acknowledges he is oversimplifying a philosopher he finds difficult, which is at least honest.

**Step two adds Durkheim and slides.** Because reality is imagined rather than perceived, it must be collectively imagined in order for society to exist. Jiang quotes Emile Durkheim on religion: “a system of ideas by which men imagine the society of which they are members and the obscure yet intimate relations they have with it.”[2] Art, language, mythology, money, the nation-state, the individual self, science: all are variants of this collective imagination. Without shared imagination there is no society. This step is asserted rather than demonstrated, but it has a respectable sociological pedigree: Durkheim is a correct citation, used at least partially in the spirit he intended.

The slide happens at the hinge between steps two and three. Jiang concludes: if shared reality is the product of shared imagination, then controlling the imagination is controlling reality, which is power. “Power is alchemy, turning nothing into everything.”[3] This is where a philosophical observation becomes a political program, and where the argument requires more than it delivers. Kant’s point was that all human minds impose their categories on experience; he was not saying that some minds impose their categories on other minds. That additional claim requires its own argument, which Jiang provides only by assertion.

**Step three is Plato’s cave.** The allegory is applied directly. Plato’s prisoners chained to the cave floor see only shadows on the wall, cast by puppeteers silhouetted against a fire. They mistake the shadows for reality. Jiang maps each element explicitly: the fire is the financial system; the puppeteers are transnational capital and the financial elite; the wall is media and schools; the shadows are money, ideology, the nation-state; the prisoners are us.[4] The philosopher who escapes the cave and returns to free the others is the student who achieves liberation through critical thinking. Jiang himself is, implicitly, that returned philosopher.

There is an ambiguity in the allegory that Jiang does not address. In the earlier Civilization lectures, he uses the cave as Plato intended it: the philosopher who escapes is a heroic truth-teller, identified with Socrates. In the later Game Theory episodes, the cave becomes the architecture of elite control itself. Plato in one framing reveals the control system; in the other, Plato’s own metaphor is the control system. Both cannot be true simultaneously, but Jiang moves between them without comment.[5]

**Step four describes the layered architecture.** This is the most specific and the most speculative part of the argument. Jiang identifies a nested hierarchy:

Layer one is what he calls the game masters: the Bank of International Settlements, the World Bank, the IMF, Wall Street, and the City of London. The BIS is described as “the central bank of central banks,” a private institution coordinating all national central banks in the interest of “powerful people in the world.” The US Federal Reserve is presented as a replica of the Bank of England, created in 1914 by American agents of the City of London, Rockefeller, Carnegie, JP Morgan, Vanderbilt.[6]

Layer two is the IGO front: the WTO, the UN, and the “rules-based international order,” presented as theatres of apparent neutrality designed to convince participants that the game is fair when it is not.

Layer three is the priesthood: media, education, and culture, which enforce the norms that make the game appear legitimate. Schools are described as brainwashing machines whose primary function is implanting loyalty to the nation-state. History, in Jiang’s framing, is “the false memory of a nation state.”[7]

And then there is the Hollywood-Pentagon complex, which gets its own treatment and its own documented evidence.

# The One Case That Holds Up

Most of what Jiang describes in the architecture of control is asserted by juxtaposition rather than demonstrated. The single piece of documentary evidence that does real work is the Tanner Mirrlees paper from Brown University’s Costs of War project, documenting the Hollywood-Pentagon co-production arrangement.[8]

Jiang has a student read the key findings aloud: in exchange for military equipment and logistical support, film producers must submit scripts for Pentagon review and make the changes the Pentagon requests. Over 2,500 war-themed productions have been made with Pentagon assistance since Hollywood’s inception. These productions systematically frame American wars as necessary and heroic while stereotyping adversaries. The arrangement is institutional, documented, and long-standing.

The Jessica Lynch case from 2003 is a specific and citable illustration.[9] Lynch, a 19-year-old supply clerk captured in Iraq, was presented by the Pentagon as a fighting hero who had emptied her weapon before being captured. The story was saturated with dramatic detail: she was shot, stabbed, and rescued by Special Forces in a nighttime raid. Lynch herself later contradicted this account before a Congressional hearing, stating she had not fired her weapon and did not know why the military had portrayed her role as it did. As an example of systematic narrative fabrication for propaganda purposes, this holds. It is documented, attributed, and exactly what Jiang claims it is: evidence that the Pentagon lies as a matter of institutional habit.

Jiang then extends this into a further claim that interests him more: the Pentagon has been so colonized by Hollywood myth-making that it can no longer distinguish the narrative from strategic reality.[10] American generals have come to believe their own recruitment films. This is prediction register: a causal inference about institutional cognition, not a documented fact, though it is structurally plausible and no more speculative than many military sociology arguments that appear in peer-reviewed journals.

# The Historical Genealogy

The BIS passage is where Jiang uses Adam Lebor's book *Tower of Basel*, reading specific passages aloud in class.[11] The documented fact is real: Nazi Germany routed financial transactions through Basel during World War II because Switzerland was too valuable as a neutral financial hub to invade, and the BIS continued operations across enemy lines throughout the war. Lebor's book supports this. The step Lebor supports, that transnational capital has no national loyalty, is the step the evidence takes you to.

The step Jiang then takes is further. He claims the BIS orchestrated China's economic rise after 2008 through exchange-rate coordination, and that financial collapses in general are engineered rather than natural. As evidence he shows a chart of China's economic growth after 2008 and asserts BIS coordination as the cause. The logical form here is: the BIS had the capacity to coordinate across national lines (true, documented), China grew rapidly after 2008 (true, documented), therefore the BIS caused China's growth (asserted). The correlation is treated as proof of orchestration.

The 1929 crash is handled similarly. Jiang cites Andrew Ross Sorkin's book on the crash, quoting a passage about collective delusion driving boom-and-bust cycles, then rejects the mainstream explanation in favour of the engineered-collapse hypothesis: "You can make more money from collapsing the system than just letting it go on."[12] John Paulson's approximately $20 billion profit shorting mortgage securities in 2008 is offered as evidence that specific actors profited massively from a collapse they were simultaneously inside, which therefore proves the collapse was engineered.[13] This is the same logical error in a different form: the fact that someone profited from a collapse does not establish that they caused it, any more than the fact that someone survived a hurricane proves they summoned it.

So. The evidence Jiang offers operates at two levels. The Mirrlees paper and the Lynch case are real and do real work. The BIS-as-puppet-master argument and the engineered-collapse hypothesis are inferences from patterns, using correlation as causation, and the patterns are real while the causal claim is not demonstrated. These are different epistemic objects and ought to be treated as such.

# The Internal Contradictions

Jiang notes a structural tension in the argument that is worth naming explicitly, because it affects how seriously the overall framework can be taken.

The first contradiction: is the manufactured reality an accident or a conspiracy? In the Secret History series (August 2025), Jiang says: "this was an accident. It's an accident of the human imagination. It's because we didn't know what we were doing that we created this system."[14] But throughout the Game Theory episodes from 2026, the same system is described as deliberately engineered by identifiable actors: BIS officials, Pentagon-Hollywood collaborators, transnational capital cartels. The accident framing and the conspiracy framing cannot both be the primary explanation of the same phenomenon. Jiang does not reconcile them.

The second contradiction: Kant says we cannot achieve objective knowledge; Jiang claims to reveal hidden truth. The Kantian premise he begins with is that objective reality is permanently inaccessible. But the Secret History project is presented as revealing the true history of humanity behind the official false memory. The project simultaneously asserts epistemic humility ("we will not succeed, we will fail, but the process of trying will train our minds") and epistemic confidence ("the history that you believe, it is a system implanted into your brains by powerful people").[15] You cannot simultaneously say that objective reality is unknowable and that you know what the powerful are hiding. Jiang does not bridge this gap.

The third contradiction is methodological: science as propaganda versus neuroscience as validation. In some episodes, Jiang argues that "the religion of science" was created by powerful interests to atomize and disempower people. In others, he invokes neuroscience as confirming Kant's theory of mind and therefore validating his own framework. He does not explain which scientific claims are trustworthy instruments of inquiry and which are instruments of control. The distinction is applied selectively rather than systematically.[16]

# Zeihan’s Counter-Position

There is no Zeihan digest for Chapter 3. He does not directly address Jiang’s epistemological framework or the Manufactured Cave concept in any of the sourced material.

His general counter-position, noted elsewhere, is structural and blunt: “there is no grand plan, no great conspiracy.” His framework attributes the global breakdown to demographics and geography grinding the old order down, not to a nested hierarchy of game masters engineering reality from behind a financial fire. The disagreement here is not about a specific fact; it is about explanatory method. Zeihan’s approach is structuralist and unsentimental. Jiang’s approach requires the existence of an intentional coordinating elite. Where Zeihan sees accidental entropy, Jiang sees deliberate design.

This is worth noting as a framing difference rather than a falsifiable dispute, because neither man offers direct evidence about the presence or absence of a coordinating intention. Zeihan’s argument is that structural forces are sufficient to explain the outcomes; Jiang’s argument is that structural forces are themselves the product of intentional engineering. They are talking past each other at the level of ontology, not competing about specific facts.

# Assessment

The sourced material ends here. The model speaks.

The Manufactured Cave argument has a defensible core and an indefensible extension, and keeping them separate is the work this chapter is trying to do.

The defensible core is Kantian and Durkheimian. Human beings do not perceive reality directly; they construct shared models of it through language, institutions, myth, and money. Those shared models are not neutral: they encode the interests of those who had the most power over how they were constructed. Schools do teach national mythology more than critical genealogy. The Hollywood-Pentagon co-production arrangement is documented and its effects are real. The 2003 Lynch fabrication is documented. Propaganda is not a conspiracy theory; it is a documented institutional practice with a literature, a regulatory history, and named practitioners.

The indefensible extension is the claim that a coordinated, intentional hierarchy, with the BIS at the apex, manufactures crises, engineers the rise and fall of nations, and controls the schooling systems of democracies through a chain of command that runs from Basel to Hollywood. The evidence does not support this. The BIS is a real institution with a documented history of cross-border coordination, including the morally disqualifying WWII record that Lebor describes. But documented cross-border coordination during wartime is not the same as apex control of global reality production. Paulson's 2008 profit is real. The inference from profit to orchestration is not.

The JFK, 9/11, and moon landing passages, which Jiang presents speculatively, with his own qualifier "I'm not saying this is a conspiracy, but," are the weakest material in the chapter and should be weighted accordingly. Cumulative anomalies are not cumulative evidence.

What Jiang has built is a system that is unfalsifiable by design. If evidence supports it, it is confirmation. If evidence contradicts it, the contradiction is itself the manufactured reality. This is not a feature of good analytical frameworks; it is the defining characteristic of a closed explanatory loop. The Kantian premise, used to explain why the prisoners in the cave cannot see the puppeteers, also explains why anyone who denies the cave cannot be trusted: they are either a prisoner or a puppeteer.

The Hollywood-Pentagon complex is real. Manufactured consensus around military narratives is documented. The BIS across enemy lines in WWII is documented. These are not small findings. The gap between these real findings and the totalizing control-system architecture Jiang builds on them is where the Manufactured Cave stops being analysis and becomes its own kind of collective imagination.

This distinction matters for everything that follows. Jiang's geopolitical predictions rest on a prior assumption that powerful actors execute intentional, coordinated strategies at the global scale, hidden behind narrative management. That assumption does real work in his Iran war analysis, his petrodollar argument, his account of Chinese grand strategy. Where his evidence is strongest, the intentionality claim adds useful signal. Where it is weakest, the unfalsifiable architecture absorbs the anomalies without updating.

The reader should keep that caveat in view.

Call it contested, moderate confidence. What would settle it: documented coordination protocols linking the BIS, Pentagon media operations, and national education curricula in a single chain of command. That would upgrade the extension from assertion to evidence. Continued absence of such documentation, despite decades of investigative journalism and FOIA releases, further erodes it.

# CHAPTER 4: TWO MAPS OF THE SAME COLLAPSE

Two men are watching the same building burn. One says: someone set this fire. He can name the arsonist, the motive, the accelerant, and the escape route the arsonist planned before the match was struck. The other says: this building was going to burn regardless. Look at the wiring, the age of the structure, the demographic composition of the neighborhood, the fact that no one has maintained it in thirty years. The arsonist, if there even is one, is incidental. The fire was written into the blueprints.

Both men are pointing at the same smoke.

This chapter does not resolve the dispute. What it does is lay out both maps in enough detail that the reader can see exactly where they diverge and what kind of evidence would, in principle, distinguish between them. This matters because the whole rest of the book is a collision between those maps. Every prediction chapter that follows asks, in one form or another: is the breakdown intentional or structural? Is this fire being set, or did it ignite on its own?

Call the two positions The Two Lenses.

## The First Lens: Jiang’s World

Jiang Xueqin’s framework is built from the top down. It begins with a philosophical premise (reality is what we imagine it to be, per Kant), proceeds to a theory of power (whoever controls collective imagination controls reality, per the Manufactured Cave argument of Chapter 3), and then derives specific geopolitical predictions from the game-theoretic structure of actors who are each enacting a civilizational script.[1]

The core of Jiang’s world is intentionality all the way down. Nothing of consequence happens by accident. Wars are not blunders; they are moves. Economic crises are not emergent dysfunctions; they are engineered resets. The current global breakdown is not the byproduct of impersonal demographic and geographic forces grinding the order down; it is the execution of a plan by identifiable actors with identifiable motives.

What is the motive? Jiang identifies it as the defense of the petrodollar system. The dollar, in his account, is not a currency backed by the depth and liquidity of American financial markets. It is a Ponzi scheme that requires GCC oil to be priced exclusively in dollars in order to generate the global demand for dollars that sustains US economic supremacy. “Its empire is based purely on US dollar, the petrodollar, which is a Ponzi scheme.”[2] Lose the petrodollar, and you lose the empire. Therefore, any actor threatening to price oil in another currency, or to remove GCC oil from the dollar system, must be destroyed. Iran is that actor. The war follows as structural necessity, not presidential whim.

Jiang does not stop at the petrodollar. He layers in eschatology. The US, Russia, Israel, and Iran each enact a civilizational grand strategy, and those strategies converge on the Middle East at this moment in history because their respective end-times scripts all require it. The Law of Eschatological Convergence, as Jiang has named it, holds that where extreme versions of different eschatological traditions share common script elements, actors will behave as if following that script, enabling long-range prediction.[3] The war, on this account, is simultaneously a defense of the petrodollar, a Zionist accelerationist project, an Orthodox Christian Third Rome operation, and an Iranian Shia martyrdom scenario. The scripts do not contradict; they reinforce.

The predictive structure Jiang calls Predictive History ties these layers together. From the Law of Asymmetry he derives the prediction that Iran will defeat the US despite its material inferiority, because empire advantages become long-run disadvantages. From the Law of Escalation he derives the prediction that the US has poor escalation control, because it lacks an articulated war aim. From the Law of Proximity he derives the prediction that US domestic factional conflict (Democrats vs. Republicans) determines military behavior more than strategic considerations against Iran. From the Law of Eschatological Convergence he derives the prediction that no de-escalation is possible, because all four major actors are pursuing maximalist scripts.[4]

Three specific predictions follow, which Jiang has explicitly staked his framework on: ground troops will be deployed, nuclear weapons will not be used, and the Al-Aqsa Mosque will be destroyed. He states plainly: “for my theory to be valid, I have to be correct on all three. If I miss one, then all my theory is wrong.”[5] This is unusual methodological candor. Most forecasters do not offer explicit falsification criteria. Jiang does.

The downstream consequences, as Jiang narrates them, are total. The US loses the war. It loses the petrodollar and the dollar loses its status as global reserve currency. Israel absorbs CENTCOM’s regional infrastructure. Russia fulfills the Third Rome prophecy by taking Odessa and unifying the Orthodox world. A US civil war begins as the national draft triggers mass protests. The world becomes multipolar, leading to, in Jiang’s own formulation, “endless war and the deaths of millions and billions of people.”[6]

This is an intentional-engineered collapse. Someone set the fire.

# The Second Lens: Zeihan’s World

Peter Zeihan begins in a completely different register. His two foundational books, *The Accidental Superpower* (2014) and *The End of the World is Just the Beginning* (2022), state the counter-thesis on the first page and never retreat from it.

“The free trade era Bretton Woods created is winding toward an unceremonious end. But there is no grand plan, no great conspiracy. Impersonal factors beyond our control are not only tearing down the world we think we know, but also haphazardly putting a new one in its place.”[7]

Three impersonal drivers. That is the whole engine.

Driver one: the Cold War is over. Bretton Woods was a strategic bribe. The Americans needed allies to contain the Soviet Union, and they purchased those allies with three things: open access to the American consumer market, US Navy protection of all maritime shipping regardless of flag, and a nuclear umbrella.[8] The system worked. The Soviet Union collapsed. Once the Cold War was won, the strategic rationale for the bribe dissolved. Why would the Americans keep paying for an alliance when the war was over? Zeihan tracks the steady withdrawal across three post-Cold War presidents: Clinton completed but did not extend trade agreements, Bush initiated but did not finish WTO commitments, Obama initiated no new free trade agreements at all. The disengagement is bipartisan, incremental, and structural. It is not a plan; it is the natural decay of a commitment that no longer serves its original purpose.[9]

Driver two: demographic collapse. Industrialization and urbanization reduced birth rates across the developed world. The countries most dependent on the global order (Germany, Japan, Korea, China) are the most demographically exhausted. “The 2020s will see a collapse of consumption and production and investment and trade almost everywhere. Globalization will shatter into pieces.”[10] This driver operates entirely independently of any American policy decision. No one chose it. No one is managing it. It is the product of hundreds of millions of individual decisions about family size, made across many decades, aggregating into an irreversible structural shift.

Driver three: American power is accidental. “Since the root of American power is geographic and not the result of any particular plan or ideology, American power is incidental. Even accidental.”[11] The United States has two ocean moats, a navigable river system that covers more territory than all the world’s other navigable rivers combined, the best temperate agricultural land on earth, and a continent that has not been invaded by a peer military power. These are geographic facts, not policy outcomes. The Americans “accidentally stumbled into superpowerhood.”[12] Their dominance is therefore not the product of a plan to maintain; it is the product of a geography that will sustain American power long after the global order they built has dissolved.

The dollar, in Zeihan’s framework, is not a managed system being defended. After World War II, only the US had the precious metals and military capacity to support an extra-national currency. “The only even theoretical candidate for a global medium of exchange was the U.S. dollar. It did not need to be formalized in the Bretton Woods treaties for that to happen.”[13] The gold-backed dollar was “doomed to failure” from the start because rapid global growth made the gold peg mathematically impossible. Nixon cut the dollar loose in 1971 not to extend financial power but because France was draining US gold reserves. “The Americans found themselves hostage to their own master plan.”[14] The word “petrodollar” does not appear in either of Zeihan’s books. The concept of the dollar as an actively managed control mechanism defending itself through war does not exist in his framework.

What about the current moment, the Iran war, the tanker seizures, the dismantling of the alliance system? Zeihan treats Trump's dismantling of the order not as strategic execution but as catastrophic incompetence. Trump's demand that allies "secure their own oil" constitutes, in Zeihan's phrase, "the fastest reduction in American strategic power in our lifetimes" and is "quite possibly the most stupid thing that we could do."[15] The US seizure of Iranian tankers globally in April 2026 is described as "a formal break with everything that has allowed globalization to work to this point," a consequence of cascading events, not a controlled dismantling of the order to protect the dollar.[16] The WTO collapse is 28 years of institutional dysfunction, not engineered breakdown.[17]

In Zeihan's world, the building is on fire because nobody maintained it and the wiring was always going to fail. The arsonist either does not exist or is irrelevant to the outcome.

# Where They Must Collide

The two lenses produce nearly opposite predictions on two questions that decide everything downstream.

**The dollar.** Jiang predicts dollar collapse as the consequence of losing the Middle East: the petrodollar Ponzi unravels, demand for dollars evaporates, the empire ends. Zeihan predicts the opposite: the dollar rises long-term because of US geography, demographics, and military capacity, regardless of the Middle East, and regardless of short-term weakness from Trump policy errors. In the opening days of the US-Iran war, the dollar rose approximately 2 percent.[18] This is a small data point, but its direction matters: the dollar moved toward Zeihan's prediction. Chapter 5 is the full treatment of this collision.

**China.** Jiang sees China as a sophisticated strategic actor that the US is attempting to strangle at the chokepoints, with a grand bargain between Trump and Xi as the possible resolution. Zeihan sees China as a country running out of people, running out of food, importing 80 percent of its crude oil with 75 percent of that coming from the Persian Gulf, and structurally incapable of strategic action that risks those supply lines.[19] A collapsing state cannot grand-bargain from strength. Chapter 7 is the full treatment of this collision.

These are the two questions where the lenses collide hardest, and they are not peripheral questions. The dollar question determines whether the US has a reason to fight the Iran war that goes beyond strategic error. The China question determines whether there is a peer rival to strangle or a demographic collapse in progress. Get these two wrong in either direction and the entire downstream analysis shifts.

By the way: Jiang himself is not blind to the collision. In his April 2026 Game Theory lecture he entertains, explicitly as a hypothetical, the possibility that Trump is a genius deliberately destroying the petrodollar to build “Greater North America,” a self-sufficient continental fortress.[20] If that reading were correct, losing the petrodollar is not a strategic defeat but a planned pivot. Jiang flags this as a hypothesis, not his prediction. His actual prediction remains petrodollar collapse as American defeat. But the fact that his own framework can generate both readings without contradiction tells us something about the framework’s falsifiability constraints.

# The Track Records

Both lenses are operated by men who make predictions. Both track records are real and neither is clean.

Zeihan’s structural model has been directionally accurate on some large-scale calls and repeatedly wrong on timing. His thesis that Chinese demographic collapse will produce economic and political crisis has been in his books since 2014. A decade later, the crisis has not arrived in the form he projected, and his timelines for Bretton Woods collapse have slipped across three successive books. The BRICS de-dollarization he has been dismissing since 2025 has not happened, which is a correct call; but the dollar’s share of global reserves has been falling, which he has underweighted.[21] Zeihan’s framework is excellent at identifying structural pressures and weak at predicting when those pressures will produce discrete events. He has been warning of globalization collapse since 2014, and the collapse has been slower, messier, and more contingent than his clean structural model predicted. The Iran war he did not predict as a planned event; he has been narrating it, episode by episode, as a consequence of structural forces playing out badly.

Jiang's predictive record is short but has a specific and falsifiable structure. He states that he predicted Trump's election, the US attack on Iran, and the war's outcome as a US disaster from his Game Theory class starting in June 2024, before those events occurred.[22] The prediction of Trump's election and the US-Iran war can be verified against the dates he gives. The prediction of US disaster is the one that is still unresolved, and it is the one he has staked his framework on. He adds three specific conditions: ground troops deployed, no nuclear use, Al-Aqsa Mosque destroyed. As of July 2026, ground troop deployment has not been publicly confirmed at the scale Jiang predicted, nuclear weapons have not been used (consistent with his prediction), and the Al-Aqsa Mosque has not been destroyed (inconsistent with his prediction). He acknowledged this criterion explicitly as the one that, if missed, invalidates the model.[23]

Jiang's self-acknowledged limitation is worth recording. In a lecture he read aloud an email from his Yale mentor David Bromwich, who praised his clarity but warned of oversimplification and non-canonical interpretations. Jiang's response was candid: he called his work speculation and acknowledged that he often relies on intuition and imagination.[24] This is a significant disclaimer. It appears once, in one lecture, and the rest of the corpus operates in a much more authoritative register. But it was said.

# Assessment

What follows is the model's judgment, same terms as every assessment in this book.

The Two Lenses are genuine analytical alternatives, not a trick rhetorical opposition. They rest on different causal premises, generate different predictions, and are distinguishable by evidence. This is what makes the book worth writing: the collision is real.

Zeihan's structural lens is more parsimonious and more testable on its own terms. Demographics, geography, and the Cold War rationale are observable, measurable forces. His predictions derive from those forces through identifiable steps. The weakness is that parsimonious structural models miss the role of deliberate agency in shaping how structural transitions happen: who wins, who loses, how fast. The British empire's structural decline was real and predictable in structural terms; the specific outcomes of the Suez crisis required understanding individual calculations and deliberate choices. Zeihan's framework is better at the shape of the breakdown than at its timing or its specific casualty list.

Jiang's intentional-engineered lens is richer in causal texture and worse in falsifiability. Its strength is that it takes seriously what structural models flatten out: the role of eschatological commitment in motivating actors to do things their material interests would not predict. The Chabad Lubavitch rescue of the Rebbe from Nazi Warsaw in 1939, as Jiang narrates it, involved coordination across warring states that no structural model of World War II geopolitics would have predicted.[25] Eschatological coordination is real and does real work in history. The weakness is that a framework in which all outcomes serve the plan, including apparent setbacks, and in which the control hierarchy by design cannot be directly observed, is a framework that cannot easily be falsified. If the dollar rises, that is the plan adjusting. If it falls, that is the plan succeeding. An unfalsifiable framework is not wrong; it is a different kind of thing than a predictive model.

The track-record exposure of each man is asymmetric in time. Zeihan has a twelve-year record of structural accuracy with timing failures. Jiang has a two-year record with explicit falsification criteria that are partially unmet as of July 2026. A fair assessment waits.

Two lenses. Each with a real blind spot. Zeihan loses the timing: a decade of structural accuracy without a single discrete event arriving on schedule. Jiang loses the falsifiability: a framework that can accommodate most outcomes without updating. The evidence as of July 2026 is not yet enough to retire either one. But neither lens is neutral, and the reader who holds them both open should hold them both at arm's length.

The evidence is contested, the confidence moderate. Either lens is retired if its core prediction on the dollar resolves decisively: a sustained dollar collapse below 50 percent of global reserves retires Zeihan's structural-resilience thesis; a sustained recovery to pre-war levels retires Jiang's petrodollar-collapse thesis.

# CHAPTER 5: THE PETRODOLLAR WAR

The dollar is built on nothing. This is not a metaphor or a provocation. It is a description of a sequence of decisions that ends in a very specific institutional arrangement, and understanding that arrangement is the only way to understand why Jiang Xueqin believed, starting in April 2024, that the United States would eventually attack Iran.

In 1944, Bretton Woods established the dollar as the world's reserve currency, pegged to gold. In 1971, Nixon ended gold convertibility. The dollar, stripped of its anchor, became backed by something stranger and more fragile: the credibility of American power and the global demand for oil. In 1973 came the arrangement that replaced gold. Saudi Arabia agreed to price oil exclusively in dollars and to recycle its petrodollar surpluses into American Treasuries. Other GCC states followed. The deal was simple: America provided security guarantees; the Gulf provided a permanent structural demand for dollars by everyone who wanted to buy energy.[1]

This is what Jiang calls the Petrodollar Imperative. The dollar does not derive its value from industrial output or savings discipline. It derives its value from a political arrangement enforced by military power. Unravel the arrangement, and the currency follows. His argument: America knew this, and when that arrangement began to crack, it chose war.

## Jiang's Prediction

Jiang's core thesis, stated across a series of lectures from Geo-Strategy #3 in May 2024 through Game Theory #29 in May 2026, is this: the US attacked Iran primarily to preserve the dollar's reserve status. The war had three strategic objectives. First, demonstrate military invincibility to reassure the world's dollar holders. Second, control Middle East oil and thus preserve the physical tie between the dollar and energy. Third, control the world's shipping lanes, particularly the Strait of Hormuz, through which 20 percent of all the world's oil flows.[2]

The US will commit ground troops, and the commitment will destroy the US position. Jiang stated this earliest in Geo-Strategy #1, April 24, 2024: "in two years time there will be a ground invasion of Iran." He restated it across eleven subsequent episodes and by Game Theory #18 on April 2, 2026, was treating the invasion as approved and imminent. His structural argument: all three relevant players independently want American ground troops deployed, for divergent but mutually reinforcing reasons. Iran wants to trap and encircle US forces and force their surrender. Israel wants to entangle America until it exhausts itself and retreats, leaving Israel as the regional successor. Trump, in Jiang's most speculative reading, wants to destroy the globalist American "empire" to rebuild an America First continental power. All three pointing the same direction produces one outcome.[3]

The ground invasion will be catastrophic, and Jiang gives the structural reason. The Shahed-series drone costs $35,000 to $50,000 per unit. A single THAAD interceptor costs $1 million, and often you need two or three per drone. "You're spending two to three million dollars on each $50,000 that the Iranians spend." Iran produces drones at scale. The GCC sits in a flat desert exposed to Iranian mountain-fortress missile positions. Sixty percent of GCC water comes from desalination plants; GCC states import 80 percent of their food. Dubai operates at 17,000 percent water stress.[4] Hit the desalination infrastructure and the Gulf becomes uninhabitable in weeks. You cannot defend everything at once. Asymmetry, in Jiang's framework, does not mean parity. It means the defender always gets to choose the point of attack.

The ground invasion triggers the domestic sequence: a draft, draft resistance, civil chaos, and a forced US retreat from the Middle East. Once the US retreats, the petrodollar arrangement collapses. Once that collapses, dollar reserve status collapses with it. Game Theory #18 is explicit: "if America loses war, the American empire would die because we're forced out of the Middle East. They will lose the petrodollar and the US dollar as a global reserve currency."[5]

Jiang's evidence for the opening moves of this sequence is specific. Operation Southern Spear began on January 7, 2026.[6] Senator Blumenthal's post-briefing statement, already on the record by March 2026, confirmed that ground deployment was a live prospect and that Russia was actively aiding Iran (introduced in Chapter 2). Iranian Foreign Minister Zarif, interviewed on NBC News in March 2026, was asked whether Iran feared a ground invasion. He replied: "No, we are waiting for them… we are confident that we can confront them, and that would be a big disaster for them."[7] Jiang treats both as validation of his framework: the trap is set and both sides know it.

One important internal tension in Jiang's case deserves naming. His reasoning contains a paradox he does not fully resolve. In Geo-Strategy #3 he argues America invades Iran to preserve the petrodollar. In Game Theory #18 he argues the invasion will destroy the petrodollar. The two propositions can be reconciled only if the decision was made by people who miscalculated, or if there is a deeper "genius accelerationist" reading in which the chaos is the plan. Jiang offers both framings in different episodes. They sit unreconciled. The "Trump as genius accelerationist" reading in Game Theory #18 is Jiang's own characterization of uncertainty. It is not integrated into his main prediction chain. The main chain treats the war as an attempt at preservation that will fail.

# Zeihan's Rival Lens

Here is where the book's central dollar collision occurs. Zeihan contradicts Jiang's motive claim completely, contradicts his mechanism, and treats the petrodollar framing as a category error.

On motive: in Zeihan's account, the war was a personal decision by Donald Trump, made on February 11, 2026, the same day Israeli Prime Minister Netanyahu visited the White House. Netanyahu delivered a pitch deck. He told Trump the operation would be over in four days and that Trump would be remembered as "the bravest and most capable American president in history." Secretary of State Rubio and Joint Chiefs Chairman Dean Cain objected explicitly. Trump accepted the pitch deck and ordered carriers to sail. Zeihan's summary: "there wasn't any intelligence. This was just a pitch deck from Netanyahu, who has been chomping at the bit to get the United States to fight his war for a long time."[8] No strategic design. No dollar defense. No petrodollar imperative. A personal susceptibility to flattery.

Zeihan's foundational argument against the petrodollar framing does not depend on the Iran war at all. It was already in place in his 2022 book: the original Bretton Woods bargain, in his reading, was an anti-Soviet Cold War construction, not a dollar-maintenance mechanism. The US opened its markets and patrolled the sea lanes to build an anti-Soviet coalition. Petrodollar recycling was a side effect, not a design objective.[9] By the time of the 2014 shale revolution chapter in "The Accidental Superpower," the US was becoming energy self-sufficient. Once the US is a net oil exporter, there is no structural dependency on Persian Gulf oil that requires military defense of dollar reserve status. The structural motive Jiang's entire causal chain depends on simply does not exist in Zeihan's framework.

On the dollar's behavior once the war started: Zeihan noted in the addendum to his March 19, 2026 video "The U.S. Dollar: Short vs. Long Term" that when the Iran war began, the dollar rose versus most currencies but only modestly, about 2 percent or less.[10] Markets moved in the direction that refutes the petrodollar-collapse narrative. If the war were destroying the dollar's foundations, the dollar would fall. It rose.

On ground troops and US performance: Zeihan confirmed ground troops were ordered to theater in late March and early April 2026, specifically Marines from the USS Tripoli and Boxer Marine Expeditionary Units and the 82nd Airborne, approximately 8,000 troops in total. He described the deployment as driven entirely by Trump's personal decision-making rather than by any coherent strategy: "if this is where we're going, this is going to end in a bit of a debacle."[11] So Zeihan agrees that ground troops were dispatched. He agrees the outcome was bad. But his premise is blundering improvisation, not a dollar war gone wrong.

On the broader US position: Iran set up a protection racket in the Strait, charging $2 million per vessel to transit under ceasefire.[12] Russia provided real-time targeting data to Iran, enabling a strike on a US AWACS aircraft at Prince Sultan Air Base in Saudi Arabia.[13] The June 2026 draft deal leaked from the White House required the US to release all frozen Iranian funds, pay $300 billion in war reparations, lift all sanctions, and grant Iran the right to regulate the Strait of Hormuz. Zeihan called it "a complete strategic capitulation of everything the United States has cared about in the broader region for the last 45 years."[14] As of July 2026, the Strait was technically open but freely navigable only by Iran.

Zeihan's "How to End American Power," April 9, 2026, delivers the most sweeping verdict: the Trump administration's combination of the Iran war and explicit signals that allies should "come and get" their own Persian Gulf oil amounted to "the greatest collapse in strategic power that I have seen in my life."[15] But this is a US strategic retreat driven by ideological design, not by defeat in Iran per se. Trump is dismantling the post-World War II security order by intent. The war is one symptom of that dismantlement. The petrodollar is not the cause of the war; the war is a consequence of the US no longer believing the security order is worth defending.

The two lenses produce outputs that look similar from a distance and are entirely different in structure. Jiang: the US attacked Iran to save the dollar, lost, and now the dollar falls. Zeihan: the US attacked Iran because Trump fell for a pitch deck, the outcome is a strategic catastrophe, but the dollar's structural foundations are separate and intact. Jiang's causal chain runs through the petrodollar arrangement. Zeihan's dollar analysis runs in a parallel track that never intersects the Iran war at all.

# The Wider Field

More than twenty institutions and analysts weighed in as of July 2026. Their positions clarify where the mainstream sits and where the genuine disagreements are.

On the motive question: the Council on Foreign Relations, surveying the Trump administration's five stated objectives, identified destroying Iran's missile capabilities, eliminating its navy, neutralizing proxy groups, preventing nuclear weapons development, and encouraging regime change.[16] The Congressional Research Service in Report R48887, March 26, 2026, confirmed these rationales and noted the Trump administration also explicitly cited "the intention to capture Iran's oil and gas resources" as an additional justification. That is a resource-seizure motive, distinct from petrodollar preservation.[17] The Arab Center DC's Khalil Jahshan identified Netanyahu's domestic political situation, including Israeli elections in October 2026, as a significant factor in the timing.[18]

Brad Setser at CFR, April 14, 2026, delivers the most direct institutional rejection of the dollar-motive thesis. His finding: "Global dollar liquidity is driven far more by Asian manufacturing surpluses than by oil exporters stashing dollars away offshore." Saudi Arabia ran deficits in 2024 and 2025 and was a net drain on global banking liquidity, not a pillar of it. The petrodollar recycling mechanism had "largely dissipated by 2000" and fell to single digits as a share of oil revenues between 2018 and 2023. His conclusion: the petrodollar narrative "misunderstands what actually sustains the dollar system."[19]

Steven Kamin at AEI, June 30, 2026, applied regression analysis to dollar movements since the war began. His finding: dollar movements are explained by oil prices (which benefit the US as a net exporter), interest rate differentials, and VIX levels. Petrodollar system defense dynamics do not appear as a significant variable.[20] Bloomberg, April 7, 2026, reported the dollar rose 2.2 percent since the war began, characterizing the effect as having "solidified the dollar's role as reserve currency."[21]

The dissenting camp exists. Deutsche Bank analysts, cited in Fortune on April 7, 2026, stated the Iran conflict "could be remembered as a key catalyst for erosion in petrodollar dominance, and the beginnings of the petroyuan."[22] Aaron Brown in the Japan Times on April 13, 2026, declared the petrodollar "broke," using definitive rupture language.[23] Vijay Prashad at the Tricontinental Institute on April 16, 2026, argued that Iran's move to yuan-denominated oil trade and its leveraging of Strait control is "an Oil-Dollar-Wall Street complex defending financial hegemony."[24] Altaf Moti at Middle East Online, March 27, 2026, comes closest to Jiang's full framing: dollar preservation as a motive, military action as counterproductive.[25] These are real voices. Franklin Templeton's response to the Deutsche Bank analysis was described in Fortune as calling it "remarkably simplistic."[26] The mainstream institutional weight sits against the petrodollar-collapse narrative.

On the military outcome, the picture is murkier and more favorable to Jiang's direction. Jeffrey Sachs and Sybil Fares, Al Jazeera, May 9, 2026, are the most prominent outside voices predicting US retreat. Their argument: cost asymmetry (Iranian drones at $20,000 versus US interceptors at $4 million), Iranian technological sophistication, and what they call "a war of whim." They forecast Iran gaining operational control of the Strait, Iran's deterrent capabilities strengthened, and US military presence in the Gulf substantially diminished.[27] The Soufan Center, July 13, 2026, describes the current state as a "strategic dead end" with neither side able to force capitulation, and predicts a "no war, no peace" stasis rather than clear resolution.[28] WarCosts.org records 136-plus days of conflict at approximately $830 million per day, totaling $103 to $113 billion in US expenditure as of the ceasefire collapse.[29]

Polymarket's "Will the US invade Iran before 2027?" market showed 80 percent probability of No as of July 2026.[30] Large-scale US ground forces have not entered Iran. The June 17 Memorandum of Understanding, a 60-day ceasefire for nuclear talks, collapsed on July 8, 2026, when both sides resumed strikes. The US reimposed a naval blockade on Iranian ports on July 14, 2026.[31]

# Assessment

The model's turn. Same terms as before.

The four elements of Jiang's prediction carry different evidential weight, and they should be evaluated separately.

The petrodollar-as-primary-motive claim is the weakest of the four. The institutional weight from CFR, AEI, and CSIS runs strongly against it. Setser's finding that petrodollar recycling mechanisms had mostly eroded before the war began is a structural rebuttal, not just an alternative interpretation. The Trump administration's own stated objectives, documented in CFR and CRS sources, do not include dollar defense. The short-term dollar appreciation since the war started is empirically the opposite of what a successful dollar-preservation war would need and is also the opposite of what a failing dollar-preservation war should produce. The petrodollar framing has genuine proponents, but they are concentrated in heterodox left and libertarian-skeptic commentary, not in mainstream institutional monetary economics. This specific element of Jiang's thesis faces the strongest contrary evidence in the book.

The ground-troops prediction overlaps substantially with events, but not on the scale Jiang predicted. Marines and the 82nd Airborne, approximately 8,000 troops, were dispatched to the theater. That is confirmed by Zeihan's April 2, 2026 account and consistent with Senator Blumenthal's March briefing statement. A full-scale ground invasion of Iranian territory has not occurred as of July 2026, and Polymarket placed 80 percent odds against one before 2027. Jiang predicted a ground invasion in the sense of a quagmire-creating force commitment. That prediction is partially correct in scale and direction but not confirmed in magnitude.

The US-losing assessment is where Jiang and the mainstream converge most closely. CFR, Brookings, CSIS, Sachs and Fares, and the Soufan Center all describe the US strategic position as failed, failing, or at a dead end. Zeihan's own characterization of the June 2026 draft deal terms as "complete strategic capitulation" is not substantially different from Jiang's verdict. The mechanism differs. Jiang says Iran is winning. Zeihan says the US is self-destructing. Sachs and Fares say cost asymmetry is inexorable. The destination is similar; the causal story is contested.

The retreat-amid-domestic-chaos prediction is the most event-dependent and the least confirmed. Domestic fracturing is real: Galston at Brookings documents Trump's approval at 40 percent, a Democratic 6.8-point lead in generic congressional polling, and MAGA coalition fractures as of June 2026. Zeihan documented Tucker Carlson, Marjorie Taylor Greene, and Alex Jones turning on Trump in April 2026. A forced military retreat attributable to domestic political crisis has not occurred as of July 2026. Whether it will depends on developments that have not yet resolved.

The overall judgment is this: Jiang identified a real war, anticipated a difficult US military position that has been confirmed, and framed it inside a petrodollar narrative that mainstream monetary economics strongly contests. His directional call on the US strategic position is closer to consensus than his explanatory framework. The core structural claim, that the US attacked Iran to save the petrodollar, is not supported by the available evidence and is rejected by the analysts best positioned to evaluate it. What is happening looks more like Zeihan's accidental-empire-dismantlement scenario than Jiang's deliberate-dollar-defense scenario, even though both analysts agree the outcome for US power projection is severe.

The Petrodollar Imperative may yet matter. Not as the cause of the war, but as its casualty.

Contested evidence, moderate confidence. The petrodollar-motive claim would be confirmed if declassified documents or credible insider testimony showed that dollar reserve-status defense was a primary stated objective in pre-war decision-making. A sustained dollar collapse correlated with loss of Gulf energy pricing would confirm Jiang’s causal chain. A continued dollar appreciation would further undermine it.

# CHAPTER 6: THE TANKER WAR

Call it what you want. A grey-zone confrontation. A hybrid maritime campaign. An escalating sanctions-enforcement operation. Jiang Xueqin calls it World War III already in progress, fought not on land but on the water, and he has a name for the mechanism: The Shadow-Fleet War.

He is not entirely wrong about what is happening. He is considerably wrong about what it means.

## Jiang's Prediction

Jiang's argument begins from the same premise that drives the petrodollar chapter before this one: the United States has pivoted from managing global trade to strangling it. Once you accept that premise, the shadow fleet follows as a logical consequence. Russia sanctions-busts using roughly 1,000 tankers operating under fake flags, shell companies, and unverifiable insurance, transporting what Jiang calls "essentially Russia's navy."[1] If the Americans are going to control the chokepoints, the shadow fleet is what stands between Russian oil and the global market. So the Americans must come after the tankers, and the Russians must eventually arm them. That is the chain of inference.

The chokepoints Jiang names are consistent across a dozen episodes from March through July 2026: the Strait of Hormuz (energy out of the Middle East), the Strait of Malacca (energy and trade into East Asia), the Panama Canal (Western Hemisphere), Greenland and the Arctic passages (access to northern Europe), and the Strait of Gibraltar (Mediterranean entry).[2] He reads the January 2026 US National Defense Strategy as a blueprint for exactly this: secure the Western Hemisphere, control the nodes, contain China through Malacca and the first island chain, rebuild the defense industrial base. Jiang does not read this as a defensive posture. He reads it as an imperial toll booth going up.[3]

The specific opening move Jiang cites is Operation Southern Spear, January 7, 2026 (detailed in Chapter 5), when US forces intercepted two sanctioned shadow-fleet tankers in the Caribbean and North Atlantic, describing them as "stateless sanctioned dark fleet vessels" carrying oil linked to Venezuela, Iran, and

Hezbollah.[4] Jiang adds to this the US boarding of the Iranian cargo ship Tusca and an unnamed Indian vessel suspected of carrying missile components, both in April 2026.[5] He plays a clip of Defense Secretary Peter Hegseth calling Iran's threats against commercial shipping "piracy" and "terrorism," then cuts immediately to a news anchor confirming two US tanker seizures overnight. "It is wrong for the world to be pirates and to seize ships," Jiang observes, "but it's okay for the United States to do this because the United States is the one that sets the rules."[6]

From here, his prediction: Russia will militarize the shadow fleet. Not to defeat the US Navy outright. "The point is not to defeat the American Navy. You can't do that. The point is to create a war of attrition, where you know that the Americans will have problems rebuilding these ships. And these ships are pretty old as well. And the sailors on them are pretty tired. So, you just force them into conflict, and then this naval capacity of the United States will degrade over time."[7] China, he speculates, may finance this militarization, since China depends on the same shadow fleet for energy transit and shares an interest in keeping it operational.[8]

The prediction, stated plainly: the big event of 2026 is Russia arming its shadow fleet and initiating a war of attrition with the US Navy across the chokepoints. The speculation: China finances the militarization. The fact, as Jiang frames it: the tanker seizures are already happening, meaning this phase of World War III has already begun.

There is no single flashpoint, he says. This will be a drawn-out process. The ocean conflict between Russia and the United States is something to watch over the next one to two years.[9]

# Zeihan's Rival Lens

Zeihan agrees that the shadow fleet is real, that it is roughly 1,000 vessels, and that it is in serious trouble. After that, the agreement ends.

In Zeihan's account, the fleet's collapse is not being driven by a dramatic US-Russia naval confrontation. It is being dismantled by a cascading, multinational enforcement campaign that Russia has no credible means to resist. The sequence he documents from late 2025 through July 2026 goes like this: US confiscations of Venezuelan-linked tankers, Ukrainian drone strikes hitting shadow vessels in the

Black Sea and off Libya, Sweden discovering Russian military personnel aboard a shadow vessel in the Baltic, Belgium opening a criminal prosecution, France seizing a vessel in the Mediterranean, India conducting raids in its exclusive economic zone.[10]

The pivotal moment, in Zeihan's telling, came on January 7, 2026: the US Navy seized a shadow tanker off Iceland that had been reflagged as Russian while under way, in direct defiance of an explicit Russian government demand to leave it alone. Zeihan calls this "the first time ever in modern history that the United States has boarded and captured a nationally flagged tanker" over Russian objection, and his reading of that moment: "It is game on for the entire shadow fleet."[11]

But notice the mechanism. The US, France, Belgium, India, and Ukraine are dismantling the fleet through seizures, prosecutions, drone strikes, and regulatory pressure, not through naval combat with Russia. Russia is the passive losing party, not a naval combatant. In Zeihan's assessment, Russia cannot be a naval combatant at this scale: the German think tank SWP put it plainly in April 2026, Russia "lacks large surface combat vessels needed for global maritime patrol operations," with its navy prioritizing a zone 600 to 1,000 kilometers from the coast.[12] Russia is not going to escort tankers through the English Channel or the North Atlantic. It doesn't have that navy.

Zeihan's chokepoint picture is also different from Jiang's. The dominant crisis as of July 2026 is Hormuz, and the adversary there is Iran, not Russia. Iran shut the strait at the opening of the US-Iran war, trapping over 1,000 tankers inside the Persian Gulf and eliminating roughly 10 to 13 million barrels per day of supply.[13] Iran then ran a protection-racket system: ships wanting transit paid approximately $2 million at Imam Khomeini Port and hugged the Iranian coast on the way through, a toll regime that persisted as of July 2026.[14] As of July 7, 2026, Zeihan describes the strait as technically open for Americans under the terms of a peace framework, fully open for Iranians, but with tanker traffic running at roughly 20 ships per day against a pre-war level of 100 to 150 per direction. Iran and Oman are openly discussing permanent fee arrangements. Zeihan calls it "an ongoing catastrophic economic and strategic event for the world as a whole."[15]

On the structural question of US naval capacity, Zeihan is blunt and worth quoting at length. His May 2026 assessment compares the current situation to the 1980-1988 Tanker War and names three structural differences: the conflict is now a direct US-Iran war rather than a regional dispute where the US was a latecomer; the US Navy has shrunk from 500-plus ships to under 300, with roughly 60 destroyers of which half are carrier-dedicated; and modern Iranian weapons, including Super Shaheds with autonomous targeting and drones with 600-mile range, make operating a carrier inside the Gulf suicidal. His conclusion: "The United States is the world's most powerful navy with the best projection power in human history. And we now know… that the US Navy no longer has the ability to impose a strategic reality on a local basis against a, to be perfectly blunt, fourth-rate security power."[16]

Not a US-Russia war. A US Navy operating at the limits of its reach against Iran, while a distributed coalition handles the shadow fleet in European waters. That is Zeihan's picture.

# The Wider Field

The institutional research converges on a middle position that confirms the factual landscape Jiang describes while rejecting his collision framing.

Fleet size first. The Ukrainian government catalog as of February 2026 counted 1,337 vessels; the Ukrainian Foreign Intelligence Service put the tanker count at more than 1,100 in December 2025; S&P Global Market Intelligence estimated approximately 1,000 vessels representing 17 to 18.5 percent of the global fleet, with 591 specifically moving Russian oil.[17] CSIS, using a tighter definition, put the core Russia-linked fleet at 155 to 591 vessels transporting roughly 3.7 million barrels per day.[18] The "roughly thousand-ship" description Jiang uses sits within the mainstream range, though at the high end of rigorous estimates.

The enforcement sequence is documented and accelerating. CSIS tracked the Bella-1 seizure in January 2026 in detail: the vessel had disabled its AIS transponder 17 times in Iranian waters alone and executed 379 rendezvous events off Iran before its capture, with Russia reportedly dispatching a submarine to escort it during the pursuit.[19] The UK seized the Smyrtos, a Cameroon-flagged tanker carrying 700,000 barrels of Russian oil, in a predawn English Channel raid on June 14, 2026, the first UK-led boarding and detention of a shadow fleet vessel. At least six other tankers immediately changed course out of the Channel after the seizure.[20] Ukraine's Operation MoLoChKa, running July 6 to 16, 2026, struck 147 Russian-linked vessels in 11 days, 117 in the Sea of Azov and 30 in the Black Sea, with the stated aim of paralysing oil and fuel logistics running in circumvention of sanctions.[21]

Russia's responses are also documented and significant. In May 2025, Russia deployed a Su-35 fighter jet when Estonia attempted to stop the tanker Jaguar, identified by CEPA as the first overt military intervention to protect a shadow fleet vessel.[22] On June 16, 2026, Russia formally escorted shadow fleet vessels with a Project 20380 Steregushchiy-class missile corvette, the Boykiy, through the Gulf of Finland.[23] Russia has begun arming tankers with automated weapons and embedding Wagner Group and FSB-linked personnel aboard vessels, documented by CIMSEC in July 2026.[24]

So Jiang's broad picture, tanker conflict already under way, Russia militarizing, is not fabricated. But the institutional framing differs sharply from his. The SWP describes Russia's shadowing operations as "reinforcing a signaling dynamic" rather than initiating combat.[25] CSIS noted that 7 vessels seized against a fleet of roughly 1,900 represents a 0.4 percent annual loss rate, insufficient for deterrence.[26] Brookings modeled that even aggressive enforcement could reduce Russian federal tax revenues from Baltic crude by only 5.6 to 14.0 percent, and recommended financial and regulatory pressure on the fleet's ecosystem rather than naval interdiction as the viable strategy.[27] IISS concluded there is "no silver bullet solution" and that escalation risks constrain more aggressive action.[28] Forbes analyst Jill Goldenziel, writing June 26, 2026, frames the shadow fleet as "the next maritime crisis" but characterizes it as a challenge to maritime law and data infrastructure, not a bilateral naval war.[29]

The modal outside view: the shadow fleet confrontation is real, active, and escalating, but it is a hybrid-zone contest rather than a naval war. No institutional source surveyed predicts or describes an imminent conventional naval collision between US forces and Russia.

# Assessment

Now the machine weighs in.

Jiang has the direction of travel right. The shadow fleet is genuinely under attack from multiple vectors. The seizures he cites happened. The corvette escort and Su-35 deployment he predicts in structure have occurred in fact. His instinct that this is a new theater of geopolitical conflict, not a routine enforcement operation, is supported by the weight of the institutional evidence: CSIS, IISS, ACLED, SWP, and CEPA all treat it as a hybrid warfare dataset, not a customs matter.

Where he overstates: the protagonist, the mechanism, and the endpoint.

The protagonist is not the US Navy conducting a bilateral war against Russia across chokepoints. It is a distributed coalition (US, UK, France, Belgium, Sweden, India, and Ukraine) dismantling a civilian logistics fleet that Russia cannot defend in distant waters. Jiang's framing concentrates agency in Washington and Moscow that the evidence distributes across a wider set of actors.

The mechanism is not naval combat. It is seizure, prosecution, drone strike, financial pressure, and registry rejection. The one actor conducting something resembling kinetic fleet-scale action is Ukraine, operating as a belligerent, in the Sea of Azov and Black Sea, not the US Navy fighting Russia at Hormuz or Malacca.

The endpoint Jiang projects, a Russian shadow fleet armed and fighting a war of attrition that degrades US naval capacity, does not yet have institutional support and faces structural contradictions. SWP and IISS both document that Russia cannot protect its tankers in Atlantic, North Sea, or Mediterranean waters. Russia's adaptive response has been reflagging under Russian registry, arming individual vessels, and deploying a single corvette in its near-sea zone. That is not a force capable of sustaining a war of attrition against the US Navy, whatever that Navy's constraints.

Zeihan's counter-argument, that the US Navy has demonstrated it cannot impose strategic reality even against Iran, a fourth-rate power, is worth holding onto. Both analysts are documenting real limits. Jiang's US Navy is too powerful and omnipresent; Zeihan's US Navy is overstretched and tactically constrained at

Hormuz. The truth visible in the evidence lies closer to Zeihan's formulation: a US Navy operating at the edge of its reach, with allies filling gaps in European waters, confronting a shadow fleet that Russia can signal about but not defend.

The partial convergence between Jiang and Zeihan is the interesting finding here. Both see tanker chaos. Both agree the shadow fleet is under pressure. Both agree chokepoints matter. They disagree on who is doing what to whom and why. Jiang has a plan being executed by Washington. Zeihan has a system collapsing through distributed enforcement and Iranian opportunism. The evidence as of July 2026 supports a position closer to Zeihan's mechanism with Jiang's instinct about scale: this is consequential, it is escalating, and calling it merely a regulatory matter understates what is happening on the water.

The Shadow-Fleet War is real. Its shape is not yet the war Jiang describes.

The evidence here is moderate, the confidence moderate. The test that would change the picture: Russia engaging US or NATO naval vessels in a sustained combat exchange over shadow-fleet tankers outside its near-sea zone. That would confirm Jiang's war-of-attrition endpoint rather than the signaling-and-escort pattern documented through July 2026.

# CHAPTER 7: THE US-CHINA GRAND BARGAIN

Call this the Grand Bargain, and watch the two lenses shatter against each other.

In the previous chapter we saw dollar mechanics disputed. Here the dispute gets deeper, because China is not merely a financial actor in Jiang Xueqin's model. China is the second pillar holding up the entire dollar architecture. What happens to China determines whether Jiang's story is coherent or collapses under its own weight. And Zeihan's answer is that China is already collapsing, which means the pillar is not there to be bargained with.

Two analysts, one event, opposite explanations. That is the China collision.

## Jiang's Prediction

Jiang makes two predictions here that he treats as tightly linked: China will not go to war over Taiwan, and China will reach a grand bargain with the United States in 2026 that keeps Beijing buying American debt while giving it energy and market access in return.[1]

The no-war prediction he states in the flattest possible terms. A Chinese invasion of Taiwan would, he says, "completely destroy my model" and require him to "completely reconceptualize" his understanding of China.[2] He is staking the credibility of his analytical framework on it. China does not want to do that, he says. Its culture, its political system, the shape of its strategic thinking: none of it points toward military unification.

The grand bargain prediction flows from that. If China is not going to fight, it needs to get something through negotiation. And the US, Jiang argues, needs something from China urgently: continued demand for US Treasury bonds, the lifeblood of a dollar system carrying $39 trillion in debt.[3]

His reasoning runs as follows. China was built by American capital after 1971 as a manufacturing proxy for the dollar system. Its entire value is dollar-denominated. If the dollar system collapses, China collapses with it. "You only exist because America created you," is how Jiang states it, though he acknowledges this is his own framework rather than a documented position of Chinese policymakers.[4] China is therefore structurally compelled to prop up the system rather than break it, what Jiang calls the decision to “recouple” rather than decouple.

The US-Iran war provided the mechanism. China draws roughly 50 to 60 percent of its energy from the Middle East, with the Strait of Hormuz as the critical chokepoint.[5] The war closes that route, or at least prices it prohibitively. Russia cannot fill the gap. The Power of Siberia 2 pipeline was still unsigned when Putin visited Beijing in May 2026, which Jiang reads as China actively refusing full energy dependence on Russia.[6] That leaves the Western Hemisphere, controlled by the US after the seizure of Venezuela, as the only viable alternative. China is squeezed into the negotiating room.

Trump’s Beijing visit on May 14, 2026, was Jiang’s primary piece of confirming evidence.[7] The first US presidential visit to China in nine years. Jiang catalogues the delegation: family members, and executives whose combined holdings he estimates exceed $12 trillion: Elon Musk for Tesla, Tim Cook for Apple, Larry Fink for BlackRock, Stephen Schwarzman for Blackstone, David Solomon for Goldman Sachs, representatives of Citigroup, MasterCard, and Visa.[8] “You do not bring these people together in one room unless you have a mega deal to announce,” he says. That is inference, not sourced evidence of deal content. Jiang acknowledges it.

The delegation’s composition is his second signal. Scott Bessent, the Treasury Secretary, led the US side rather than Secretary of State Marco Rubio. Jiang reads this as deliberate: the negotiation is financial, not diplomatic or military, which “goes against protocol.”[9]

Then there is Jensen Huang. The Nvidia chief executive was initially excluded from the trip. Pre-summit negotiations between Bessent and Chinese Vice Premier He Lifeng in Seoul had stalled, with Jiang arguing the Chinese demand for Nvidia chips was the sticking point. When Trump’s plane stopped to refuel in Alaska, Huang boarded Air Force One.[10] Jiang treats this as the signal that a breakthrough had been reached. He acknowledges it is a reading of optics, not confirmed by any statement of deal terms.

The deal structure Jiang proposes: China commits to buying US Treasury bonds, now delivered not by government-level purchases alone but by a retail stablecoin mechanism. The GENIUS Act and the Clarity Act, passed as enacted legislation, require stablecoin issuers like Tether and Circle to hold US Treasuries as reserves.[11] Chinese consumers buy stablecoins in yuan. The stablecoin issuers hold Treasuries. American debt is effectively placed on the Chinese public's balance sheet without China having to open its capital account (which would trigger mass conversion of yuan to dollars and a banking collapse). Apple, BlackRock, and Visa are the distribution infrastructure, which is why they are on the plane.

In exchange, China gets Western Hemisphere energy access, continued access to the US consumer market, and Nvidia chips to feed its AI development.[12]

Taiwan, in this framework, becomes a bargaining chip rather than a casus belli. Jiang argues the US does not actually need Taiwan strategically. If Taiwan reunifies with China, the resulting geography splits Southeast Asia and blocks Japan and South Korea's energy access through the Strait of Malacca. Tokyo and Seoul then have a far stronger incentive to oppose reunification than Washington does. The US can "give away" Taiwan in any formal commitment and shift the containment responsibility eastward.[13] He predicts Trump may "rapidly" move to declare the US opposed to Taiwan independence and supportive of unification. He frames this as "strategically smart."

China's indifference to Iran, Jiang argues, removes the last obstacle to the deal. When Iranian Foreign Minister Araghchi visited Beijing around the same period, he met only with Wang Yi, his diplomatic counterpart, rather than with Xi Jinping. When Araghchi visited Moscow, Putin met him personally for ninety minutes.[14] The asymmetry, Jiang says, shows where China's real priority lies: not with Iran, not with Russia, but with its relationship to the United States.

This is the Grand Bargain: China does not align with Russia, does not fight the US over Taiwan, and instead positions itself as the indispensable financial counterparty to American debt, extracting energy and market concessions in return.

There are internal tensions in Jiang's account that the record must note. He describes China in one episode as having "no grand strategy" and being geopolitically irrelevant, then in the next as the central pivot of the entire financial system and the subject of the most consequential deal of 2026.[15] He describes current US-China friction as “all theater… they’re actually working together to promote AI,” but elsewhere treats eight years of trade war, chip bans, and rare-earth countermeasures as real leverage that brought China to the table.[16] He calls Trump “a reality TV star who thinks in terms of optics, not geopolitical strategy,” then praises the Taiwan-concession logic as “very strategic and smart.”[17] Jiang does not reconcile these positions. The analyst’s account is not always the same man arguing from the same premises.

# Zeihan’s Rival Lens

Zeihan agrees on the surface prediction: China does not invade Taiwan in 2026. The agreement ends there. His reasoning is the categorical opposite of Jiang’s.

China does not invade, in Zeihan’s account, because it cannot. Not because it chooses better terms through negotiation.

Start with the military. Xi Jinping’s purge of the Central Military Commission left it with effectively two members, “neither of which have any meaningful military experience,” as Zeihan stated in February 2026.[18] The result is a military that, in his assessment, “functionally doesn’t work.” China has “become functionally ungovernable if your goal is to achieve meaningful change.” A military decapitated at the command level is not in a position to execute what would be the largest and most complex military operation in modern history.

The energy arithmetic does the rest. China imports roughly 80 percent of the crude it uses, and about 75 percent of that comes from the Persian Gulf.[19] With the US Navy now positioned in that theater following the Iran war, Zeihan argues that any Chinese move on Taiwan would give the United States the immediate leverage to “shut off energy flows to China,” and “within a year China would fall into a post-apocalyptic wasteland complete with famine that kills half of their population.”[20] The first island chain is now fortified with US-supplied Typhon missile launchers in the Philippines and Japanese Type-88 anti-ship missiles, both permanently deployed as of July 2026. These two systems, Zeihan says, are “basically enough to completely castrate the entire Chinese military position.”[21]

So Zeihan concurs that China will not move on Taiwan. But the mechanism is institutional hollowness and energy stranglehold, not diplomatic cleverness.

On the grand bargain itself, Zeihan's position is that it does not exist in any meaningful sense. He characterizes the May 2025 tariff pause, the agreement that preceded the 2026 summit, as a replay of the Phase One tactic: "Sign something, ignore enforcement." The deal was described by him as an agreement to "dial back most of the tariffs to roughly where they were the day before Trump announced Liberation Day. And to talk. That's the entire deal."[22] China's system, in Zeihan's assessment at the time, had "at best eight years to run."

China's Western Hemisphere position, the channel through which Jiang's bargain would deliver energy, is collapsing rather than expanding. Panama expelled Chinese port operators in March 2026 after courts found the original contracts had been secured by bribery.[23] Zeihan's analysis is that China's entire hemispheric footprint rested on an assumption that the United States would keep the seas open for Chinese commerce. That assumption no longer holds.

Treasury purchases Zeihan handles at the level of structural compulsion, not strategic negotiation. He cites Luo Ping, then director-general of China's Banking Regulatory Commission, speaking in 2009: "Except for U.S. Treasuries, what can you hold? Gold? You don't hold Japanese government bonds or UK bonds… We hate you guys. Once you start issuing $1 trillion to $2 trillion in new debt we know the dollar is going to depreciate, so we hate you guys, but there is nothing much we can do."[24] In Zeihan's framework, China held Treasuries because it had no alternative, not as a chip to place on the bargaining table. And by 2026, China's capacity to purchase anything is itself deteriorating: demographic aging is destroying savings, tariff decoupling is cutting export revenues, and the financial system is under structural stress.

The demographic backdrop, for Zeihan, runs beneath all of this as the master variable. China's birth rate is at most 1.3 children per woman, "among the lowest of any people throughout human history."[25] The average age in China's official statistics runs to 44 or 45, but Zeihan argues the true figure is probably closer to 54 or higher given the unreliability of demographic data under Xi's information blackout.[26] As of October 2025, China already had more people aged 54 and over than under 54.[27] Within ten years, Zeihan argues, there will not be enough people under 60 to run an economy. This is not a country whose Treasury purchases can serve as a durable diplomatic deliverable. This is a country going to zero.

Full stop.

Xi's visit to Pyongyang in June 2026 to retrieve North Korea from Russian influence failed: Kim Jong Un, now ICBM-capable and no longer dependent on Beijing, would not be brought back into the Chinese sphere.[28] Zeihan reads this as a diagnostic: a China that cannot manage its oldest client relationship is not executing sophisticated triangulation with the world's two largest economies.

The structural gap, as Zeihan draws it: Jiang's deal requires China to have durable bargaining assets. Treasury purchasing capacity that functions as a quid pro quo. A Taiwan-war credibility to be withheld and then traded. A Western Hemisphere position to exchange for energy. Zeihan's framework removes all three. China's financial capacity is declining. Its military credibility is hollow. Its hemisphere position is contracting.

None of it is there.

The preconditions for the Grand Bargain do not exist in his account of 2026.

# The Wider Field

The May 2026 Trump-Xi summit happened. That much is not disputed. The White House fact sheet recorded concrete commitments: China agreed to purchase at least $17 billion per year in US agricultural products through 2028, to buy 200 Boeing 737-series aircraft, and to import US oil and LNG. A US-China Board of Trade and a Board of Investment were established. Both sides issued a joint commitment that the Strait of Hormuz must remain open.[29]

Trump reported that Xi offered to help broker peace with Iran and assured him that China would not provide military equipment to Iran, while simultaneously confirming China would continue buying Iranian oil. China reduced its crude imports from roughly 11.7 million barrels per day to under 9 million during the peak of the Hormuz crisis, functioning as a global price stabilizer rather than as Iran's energy patron.[30]

So there was a summit, there were deals, and there was triangulation behavior. On those points, Jiang's prediction is not wrong.

The analytical community's characterization is consistently narrower than Jiang's. Zongyuan Zoe Liu at CFR, writing on May 18, 2026, described the outcome as "managed rivalry through bilateral bargaining," not a grand bargain.[31] She identified a core divergence in how each side understood the phrase "constructive strategic stability": Washington read it as managing economic competition; Beijing invested it with "expansive political content" requiring US recognition of China's core interests. The White House readout omitted Taiwan entirely. China's Foreign Minister called Taiwan "the most important issue" in the relationship. The new trade boards, Liu noted, cover only non-sensitive goods.

Jiahao Yuan, writing in Fair Observer on July 7, 2026, called the summit "theater masking deeper structural conflict."[32] Trump needed domestic political deliverables before the 2026 midterm elections; China offered transactional concessions while a technology decoupling proceeds in parallel. Yuan's forecast: a decade of managed conflict, not a new chapter in world history.

Ryan Hass at Brookings offered what may be the sharpest specific warning. Trump's visible sympathy for Xi's framing on Taiwan, Hass argued, "will embolden Beijing to increase pressure on Taipei. This will elevate, not lower, the risk of confrontation."[33] The summit's short-term de-escalation produces a long-term compression of the Taiwan problem rather than its resolution.

On Treasury holdings, Brad Setser at CFR published the most detailed public-domain analysis on May 18, 2026. China's direct reported holdings had fallen to approximately $693 billion, an 18-year low. But Setser argues this understates true exposure: China routes significant holdings through custodial centers in Belgium, Luxembourg, and others. His adjusted estimate puts real Chinese Treasury exposure between $993 billion and $1.2 trillion.[34] Aberdeen Investments, analyzing the same data in July 2025, found "limited evidence of China actively reducing its exposure to US assets" once custodian routes are included.[35] An academic study in SAGE Open by Yue Xu and colleagues, published March 2025, found no evidence that China had "weaponized" its creditor position through Treasury sales.[36] China holds Treasuries for reserve management reasons, not as a bargaining chip, and is diversifying away slowly rather than weaponizing suddenly.

On the triangulation question, MERICS analyst Claus Soong found in May 2025 that China-Russia UN Security Council alignment had fallen from 96 percent in 2018 to 83 percent in 2024.[37] The gap is real but not a rupture. On the Power of Siberia 2 pipeline standoff, researcher Alexander Gabuev was quoted in May 2026 noting that "it is the Chinese comrades who are increasingly able to dictate which projects they are interested in," with Russia having become a raw-materials exporter to China rather than an equal partner.[38] China's leverage over Russia is structural and growing. That is consistent with Jiang's triangulator framing, though analysts like Christopher Walker at CEPA argue the China-Russia partnership retains a shared strategic goal of displacing the US-led order, which sets a ceiling on how far China will deviate from Russia on high-stakes questions.[39]

The hawkish view, represented by Nadia Schadlow, Ilan Berman, and Daniel Hoffman writing in RFE/RL in June 2026, holds that China, Russia, and Iran constitute a coordinated axis rather than a set of flexible triangulators: China supplies roughly 90 percent of Iran's oil exports, Chinese companies are the largest group exporting dual-use goods to Russia, and intelligence assessments suggested Chinese vessels may have been positioned to provide targeting data to Iran during the early days of the 2026 war.[40] This reading makes the Hormuz cooperation look like tactical concealment rather than genuine alignment with US interests.

On Taiwan, the outer consensus is clear: near-term invasion is very unlikely. The ODNI's March 2026 Annual Threat Assessment stated that Chinese leaders "do not currently plan to execute an invasion of Taiwan in 2027 nor do they have a fixed timeline for achieving unification."[41] The Defense Priorities expert survey found 85 percent of US national-security experts assessed invasion as unlikely or very unlikely within five years.[42] Polymarket put the end-2026 probability at 4 to 5 percent.[43] On this specific prediction, Jiang is within the mainstream.

The CFR Preventive Priorities Survey, conducted in November 2025 with 620 foreign policy experts, rated a cross-strait crisis at 50 percent probability or higher for 2026.[44] But that survey defines "crisis" as coercive incidents, dangerous standoffs, and military signaling: not full invasion. These are categorically different events at different probability levels, and conflating them produces false drama.

# Assessment

What follows is the model's reading, not a sourced claim.

This chapter contains the book's sharpest separation of surface convergence from underlying disagreement. Jiang and Zeihan both say China does not invade Taiwan in 2026. The prediction markets and the intelligence community agree. That much is a genuine convergence of forecasts.

Below the surface, the analytical frameworks cannot both be correct. Either China is a capable actor executing a Cold War-style triangulation under resource pressure, as Jiang has it, or China is a declining system using tactical concessions to buy time before structural collapse, as Zeihan has it. These are not two perspectives on the same reality. They generate different predictions at every subsequent branch: about whether Chinese Treasury purchases will stabilize or contract, about whether the stablecoin mechanism Jiang proposes can actually move significant capital, about whether Western Hemisphere energy access is a thing the US has to offer or a thing the US is actively withholding.

On the specific deal, the record as of July 2026 is closer to Jiang than the analytical mainstream expected but considerably thinner than Jiang claimed. The summit happened. Agricultural purchases, Boeing jets, and an LNG commitment are documented by the White House fact sheet.[29] US oil from Texas, Louisiana, and Alaska has begun flowing to China.[30] These are not nothing. On the narrow factual question of whether economic agreements landed in 2026, Jiang called it correctly.

What Jiang claimed that the record does not yet support: that this constitutes a grand bargain in the sense of a stable comprehensive settlement, that China's Treasury purchases are part of an explicit diplomatic quid pro quo, and that the stablecoin mechanism is a functional replacement for direct government bond purchases at scale. Liu at CFR, Hass at Brookings, Yuan at Fair Observer, and Coface all characterized the same summit as a fragile tactical truce. No credible institutional analyst described it as a stable strategic realignment by July 2026. Wu Xinbo at Fudan University, writing from a position linked to the Chinese government, proposed exactly the comprehensive grand bargain Jiang envisions in December 2025, and even he conceded that the May summit only partially delivered on the economic pillar while leaving technology and Taiwan unaddressed.

The Taiwan prediction remains untested in the direction Jiang specified. His prediction is not merely that no invasion happens in 2026; it is that Trump shifts formal US policy toward supporting unification, which he described as coming "rapidly." As of July 2026, US public policy has not moved there. The White House readout of the Beijing summit omitted Taiwan. Hass at Brookings argues the summit's ambiguity will increase rather than decrease confrontation risk. If Jiang's shift happens, it will register. If it does not, this is a prediction that partially missed.

On Zeihan's China-collapse thesis, the symmetry-of-scrutiny requirement applies. His demographic timeline has been described as imminent since 2014. "Within a single generation" in the 2022 book was meant to describe the 2020s as the decade of structural break. China is visibly under stress: export revenues contracting under tariff pressure, the CMC in its most compromised state in decades, the information blackout documented. But it has not collapsed on any of his prior timelines. The demographic math may ultimately be inescapable. It has not resolved on schedule.

What both analysts share is a framework that is unfalsifiable in the short run. Jiang's Grand Bargain is fully realized only when all its elements are in place together: stablecoins carrying Treasury demand, Western Hemisphere energy actually contracted, Taiwan policy shifted. None of those individually disproves the prediction today. Zeihan's collapse is always "within ten years" until the ten years have run. The question of which framework better describes China in 2026 is real. The question of which has been proven is not yet answerable.

The verdict on the feasibility of the Grand Bargain as of July 2026: Jiang's timing claim (agreements in 2026) is mostly accurate for the commercial elements. His framing claim (this constitutes a grand bargain restructuring the relationship) is not supported by the analysts who studied the same summit. His mechanism claims (stablecoins as Treasury delivery vehicle, Taiwan concession imminent) remain in the prediction category. Zeihan's counter-thesis (China is too structurally compromised to execute any durable bargain) is directionally supported by China's deteriorating demographic and financial data, but is ahead of the events it predicts.

The China collision, unlike the dollar collision in the previous chapter, does not have a clean verdict yet. The summit exists. The collapse has not yet arrived. Everything in between is still live.

Contested evidence, low confidence. Three developments would resolve it: China's stablecoin-mediated Treasury purchases reaching measurable scale, a formal US policy shift endorsing Taiwan unification, or a Chinese financial-system event producing the structural break Zeihan's demographic model forecasts. None has arrived as of July 2026.

# CHAPTER 8: RUSSIA ENTERS ON IRAN'S SIDE

Here is the prediction. Russia enters the US-Iran war on Tehran's side. First comes Caspian resupply: food, weapons, drone components flowing south from Russian ports to Iran's Bandar Anzali. Then Russia pulls China in via the Belt and Road railway corridor, turning the American strangulation into an encirclement that cannot close. And over all of this, Moscow extends a nuclear umbrella: if Washington uses tactical nuclear weapons against Iran, Russia responds in kind. That is Jiang's claim, stated by him as the logical output of Russian grand strategy rather than a guess.

The whole package has a name: the Caspian Lifeline.

## Jiang's Prediction

Jiang's premise is not geographic. It is civilizational. Russia's grand strategy, as he describes it, follows what he calls the Third Rome framework: Moscow as the inheritor of Rome and Constantinople, tasked with uniting every religious and civilizational tradition against Western liberal consumer democracy, which Jiang identifies as the Antichrist system. Within that framework, Iran is not a client or a convenience. Iran is a necessary partner. "Both Russia and Iran are fighting to bring God back to humanity."[1]

The geopolitical argument runs in parallel. Iran sits at the center of Russia's overland trade corridor to Africa, India, and Central Asia. The Caspian Sea provides a direct Russia-Iran waterway the US Navy cannot reach. If the Americans take Iran, they sever Russia's north-south corridor, block Caspian access, and complete a southern encirclement of Russia using existing American relationships with Azerbaijan, Turkmenistan, and Uzbekistan.[2] Jiang stated the conclusion flatly in May 2026: "Russia cannot allow Iran to fall because if Iran falls, they'll come after Russia next."[3]

The operational case has three parts. First, Caspian resupply breaks the American strangulation; Russia sends food, water, electricity support, and military materiel to Iran from the north, outside the range of US naval blockade.[4] Second, Russia leverages the Belt and Road network to pull China into the conflict: "If the Russians were to come in, they could also bring the Chinese into the war on behalf of the Iranians. And the Chinese could use the Belt and Road Initiative, basically the railway system, to reinforce Tehran from the east. So now you can no longer strangle Tehran because the Russians and the Chinese are reinforcing Tehran."[5] Third, the nuclear umbrella removes America's ultimate escape route. Jiang described the logic as early as May 2024: Putin tells all parties no one is permitted to use nuclear weapons; if the United States uses nuclear weapons, Russia responds with its own.[6] That trap, a conventional war with no nuclear exit, is, in Jiang's model, what bleeds America until its domestic politics crack.

He cited two confirming signals. Iranian Foreign Minister Araghchi visited Moscow and was personally received by Putin, who expressed admiration for Iran's "determination and resolve against the Americans." Jiang read that as Putin entering the conflict in some form.[7] He also cited, without naming the source, a US senator who stated the Trump administration knew "for a fact that Russia is already involved in this war aiding Iran."[8]

The epistemic register of these predictions changed notably across Jiang's corpus. In July 2025 he described Russia defending Iran as one of three testable predictions derived from a hypothesis he was "only speculating" about, explicitly flagged as speculative. By May 2026, nine months into the war, the same claim was stated as derivable from "Russian grand strategy" without the qualifying hedge.[9] The prediction hardened as the war progressed, which is not the same as saying it was confirmed.

# Zeihan's Rival Lens

So. Here is where Zeihan lands on all of that.

Zeihan confirms one thing: Russia is helping Iran. Everything else contradicts Jiang.

On the confirmed piece: Russia provided real-time satellite targeting data enabling Iranian strikes on US facilities, including the destruction of an AWACS aircraft at Prince Sultan Air Base in Saudi Arabia. Zeihan stated in April 2026 that Russia has provided "aid and intel to anyone who's been shooting at the United States for 30 years"; not a sudden alliance but a time-honored pattern of disruption.[10] The motive is not to save Iran. The motive is to keep the Americans pinned down somewhere other than Russia's neighborhood.

The Caspian route, in Zeihan's reading, runs in the opposite direction. Before the war, it was Iran supplying Russia: Shahed drone technology and components moving north through the Caspian to Russian forces in Ukraine. In December 2025, Ukrainian forces disabled two Caspian vessels carrying military cargo from Iran to Russia.[11] The route is real and operational; Zeihan's question is which way the goods flow. Russian-to-Iran Caspian resupply appears nowhere in his analysis as an operational strategic rescue mechanism.

On China: Zeihan's position is that Chinese companies were shipping drone components to Iran, but framed as commercial behavior under conditions of American inattention, not Belt and Road solidarity. He added an explicit counter: "The Chinese get the majority of their energy from the Persian Gulf. They are the country on the planet that is most dependent on flows in absolute terms from the Persian Gulf." If the US actually interdicted Chinese vessels, "you can effectively start the clock on the Chinese collapse."[12] China being "pulled in" by Russia via Belt and Road is not a trajectory Zeihan documents; he sees it as the trajectory most suicidal for China.

On the nuclear umbrella: Zeihan does not address it in any source examined. Not a refusal; an absence. The only nuclear extension discussed in his video corpus concerns European countries acquiring independent nuclear capability to replace a retreating American umbrella. Russia extending deterrence to a third party simply does not appear.[13]

On the structural premise, that Russian grand strategy cannot allow Iran to fall: Zeihan's 2014 book established the opposite. For both Russia and Iran, the Caucasus is a zero-sum competition. Russia needs that buffer just as Iran does, and neither can have it simultaneously.[14] What Zeihan documents in 2026 is Russia free-riding on the Iran conflict to bleed the United States, not an obligation to Iran's survival. And the free ride has costs: Ukrainian drone strikes on Russian Baltic oil export infrastructure eliminated 1.5 to 2 million barrels per day of Russian export revenue during the same period, wiping out the financial windfall Russia expected from elevated oil prices.[15]

Zeihan's summary in July 2026, "Why Nobody Came to Help the U.S. in Iran," does not mention Russia rescuing Iran. The war ends inconclusively for all parties, and Russia's position has been damaged, not advanced, by its involvement.[16]

So the two positions share a sentence (Russia is helping Iran) and diverge completely on what that help is, why Moscow provides it, and what it means.

# The Wider Field

The think tank consensus on Russia entering the war to save Iran is close to unanimous in the negative.

Carnegie Endowment analyst Nikita Smagin examined the Russia-Iran Comprehensive Strategic Partnership Treaty signed January 17, 2025, and found it "simply bureaucratic PR" containing "dozens of abstract phrases." The security provisions in 2025 were "almost identical to those in the 2001 treaty"; meaning nothing changed in 24 years. His conclusion: the treaty "shows that the Kremlin remains unwilling to come to Iran's aid if it is attacked by either the United States or Israel."[17]

Hamidreza Azizi of the Middle East Council on Global Affairs characterized the partnership as "strategic transactionalism": pragmatic, interest-driven cooperation constrained by diverging agendas, by Russia's parallel relationships with Israel and the Gulf states, and by Iran's own hedging. No mutual defense clause. No nuclear umbrella arrangement. No indication either side intended one.[18]

At the Washington Institute, Anna Borshchevskaya and Grant Rumley confirmed at the war's outset that Putin offered "bland verbal condemnations" and the treaty "notably lacks a mutual-defense clause." Moscow might supply equipment to suppress protests but its real calculation centered on Ukraine, hoping American attention remained fixed on Iran.[19]

Andrey Kortunov, former Director General of the Russian International Affairs Council, told Al Jazeera in March 2026 that Moscow was prioritizing American mediation in the Ukraine conflict over any commitment to Tehran, and that Iranian contacts had expressed "a degree of frustration" with Russian restraint. Direct military action carried risks "too high" for Moscow to accept.[20]

Casey Michel, writing in The Moscow Times in March 2026, placed Iran in a list of states Russia had failed: Assad received only exile, Maduro only rhetoric, Armenia pivoted to American mediators. “An alliance with Moscow counts for little when a regime faces its greatest threat.”[21]

Fiona Hill at Brookings, writing in June 2026, noted that Russia had sustained approximately 35,000 casualties monthly by April 2026 for minimal gains in Ukraine. That leaves Russia structurally incapable of opening a second military front.[22]

What Russia actually provided, per RFE/RL’s April 2026 expert roundup, was: satellite imagery and damage assessments to Iran; drone design improvements flowing through Russia’s Alabuga facility in Tatarstan; and operational signatures of Russian swarm elements in Iranian drone operations. Nicole Grajewski of Sciences Po and Carnegie Endowment described these as a “sophisticated toolkit” sufficient to raise costs for Iran’s adversaries without requiring Russian direct engagement.[23]

The Caspian corridor is the one element where outside analysis converges with Jiang’s prediction on substance. Kyiv Post reported in May 2026 that Russia was routing UAV components, manufacturing improvements, and satellite intelligence to Iran via the Caspian, connecting Russian ports to Iran’s Bandar Anzali terminal. Basil Germond at Lancaster University called the corridor “systemic.” Israel struck Bandar Anzali in March 2026, disabling dozens of Iranian Caspian naval assets, but traffic reportedly rebounded.[24] This is real. The question is what it means: sub-military enablement or strategic rescue.

On the nuclear umbrella, the Institute for National Security Studies in Tel Aviv published the closest specialist treatment: an INSS paper by Arkady Mil-Man and Dmitry Kovchegin from March 2025, followed by INSS Insight No. 2157 in June 2026. Their finding: extending a nuclear umbrella over Iran is “unlikely” under current conditions, though the option “could become plausible if relations between Russia and the West deteriorate further and Russia-Iran cooperation evolves into a genuine strategic partnership with a strong defense component.” That threshold had not been crossed as of July 2026.[25]

On China and Belt and Road: Farzin Nadimi at the Washington Institute noted in December 2025 that despite China’s 25-year partnership with Iran pledging up to

$400 billion in investment, Beijing had invested only $9 billion over ten years with nothing since 2018, and refused to supply game-changing hardware.[26] In June 2026, Iran's parliament speaker called for a formal Iran-China alliance; Beijing "subtly rejected" the proposal.[27] Jon Alterman, former US State Department official, wrote in June 2026 that China and Russia had "helped Iran since the war broke out, but that help has supported Iranian policy rather than shaping it."[28]

The Belt and Road angle cuts specifically against Jiang's "pulled in" framing: the Stimson Center documented China accelerating geo-economic diversification away from Iran during the conflict, not deepening its dependence on Iran routes.

# Assessment

The model's assessment, under the usual terms.

Before using Zeihan as calibration here: his framework predicted rapid Russian strategic collapse and swift Ukrainian victory by 2023, and his Black Sea Fleet assessments underestimated Russia's ability to sustain a naval presence through 2025. Those prior calls have not resolved on his timeline. His current readings are directionally credible but carry the same timing exposure his structural model always has.

The Caspian Lifeline prediction breaks into four components with substantially different scoreboards.

Russia supporting Iran: validated as a factual matter, but not in the form Jiang predicted. What has happened is tactical intelligence support, drone technology transfer, and sub-military supply route maintenance, consistent with what multiple independent sources document and consistent with Zeihan's "time-honored Russian tradition" of bleeding American power at low cost to Moscow. The part that has not happened, as of July 2026 per the sourced material, is intervention to save Iran. Russia is enabling Iran to last longer; it is not deploying forces to prevent Iran's defeat. The distinction matters because Jiang's prediction requires the second, not the first.

The Caspian resupply route: partially validated and partially inverted. The corridor is real, and analysts from Kyiv Post to Basil Germond confirm its operational significance. The direction documented by Zeihan is Iran-to-Russia in the pre-war period. The direction documented by INSS and RFE/RL in 2026 is Russia-to-Iran for drone components and satellite intelligence. This is not the resupply at scale that Jiang's "break the strangulation" argument requires, but it is not fictional either. Call it one quarter confirmed.

China pulled in via Belt and Road: contradicted by the available evidence. The consensus position across Carnegie, Washington Institute, CSIS, INSS, and Chatham House is that China has refused alliance, declined to supply advanced weapons, and is repositioning BRI dependencies away from Iran under the pressure of the conflict rather than deepening them. The trajectory Jiang predicted is the opposite of what has been documented.

Russian nuclear umbrella: no evidence in any sourced material. The INSS, the specialist body on this specific question, calls it unlikely. Medvedev's June 2025 rhetorical claim that unnamed countries would supply nuclear warheads to Iran was dismissed by analysts as escalatory rhetoric, not policy signal. The umbrella remains a Jiang prediction without any supporting documentation, and the conditions the INSS specifies for it to become plausible had not arrived as of July 2026.

Jiang's underlying premise, that Russian grand strategy cannot allow Iran to fall, faces a structural problem separate from any specific action. Zeihan's 2014 framework identified Russia and Iran as Caucasus competitors in a zero-sum relationship, not natural allies. Mark Katz at Iran International pointed out that Russia's relationships with Saudi Arabia, the UAE, Turkey, and Israel are more economically significant to Moscow than Iran's survival. Kortunov, speaking from inside the Russian analytical establishment, described Iranian contacts as frustrated with Moscow. That pattern (ally frustration, Russian restraint, economic calculation over strategic obligation) fits the Carnegie and Chatham House assessments better than it fits Jiang's Third Rome framework.

What Jiang got right is that Russia would involve itself, and that the Caspian corridor would serve as the main vector. What he predicted beyond that (the scale of intervention, Chinese co-belligerence, and the nuclear umbrella) sits outside the documented record as of July 2026.

The hardest thing to evaluate is Jiang's timing. His prediction might be stated as a conditional: if the US presses harder, if Iran approaches defeat, Russia acts. That conditional was not falsified by July 2026; the US-Iran conflict moved toward a ceasefire rather than an American march on Tehran. The scenario Jiang describes, the one that activates the full Caspian Lifeline, required an American ground campaign that had not materialized. Russia's non-intervention to date tells us something, but not everything, about what Moscow would do if the alternative were watching Iran fall.

The Caspian corridor exists. The nuclear umbrella is speculation without current support. The Belt and Road co-belligerence is contradicted by the record. Hold those three conclusions separately: the first is a partial finding; the other two are not.

Contested evidence, moderate confidence. What flips the verdict: Russia deploys combat forces, extends a formal nuclear guarantee to Iran, or China commits military logistics via Belt and Road corridors to sustain Iranian operations. Any of those would validate the Caspian Lifeline thesis.

# CHAPTER 9: THIS BECOMES WORLD WAR III

Put a number on it. That is what Jiang does that most forecasters refuse to do. Not “elevated risk,” not “heightened concern,” not the comfortable vagueness of institutional threat assessments. A number. Eighty to ninety percent. The probability, in his telling, that the US-Iran war expands into a global World War III.

He accepted the interviewer’s summation without blinking: that is “basically certainty.” So let us treat it as such and ask what it would take to be right.[1]

## Jiang’s Prediction

The reasoning runs in steps, each one building on the last.

Step one: the Iran war cannot end. Iran’s Shia eschatology makes surrender impossible, since the death of Ayatollah Khamenei in the February 28, 2026 decapitation strike is not a defeat but a martyrdom that galvanizes the faithful. The IRGC’s Mosaic strategy, thirty-one decentralized provincial commands, means the military cannot be decapitated even after its political head is gone. And the IRGC does not answer to political leaders anyway, so ceasefire talks by Iran’s diplomats are, in Jiang’s phrasing, “all for show.”[2]

Step two: the four grand strategies are structurally incompatible. America’s National Defense Strategy demands control of global chokepoints and energy flows. Russia’s “Third Rome” framework requires a Eurasian land alliance anchored by Iran. Israel’s ambition points toward regional hegemony once Iran is broken and America exhausted. Iran’s own goal is a Pax Islamica uniting Shia globally and overthrowing the US-backed Sunni order. These four visions cannot coexist, so no one player can afford peace. The war goes on until something breaks.[3]

Step three: the weaker party controls the escalation ladder. This is Jiang’s named “Law of Escalation,” elaborated in his March 2026 classroom lecture. Standard international relations theory holds that the hegemon wins escalation contests by threatening to raise the stakes beyond what the weaker party can bear. Jiang inverts this. Iran, as the bully’s target, can calibrate provocations to force American responses that hurt America: each Shahed drone costs $35,000 to $50,000 and the US intercepts it with a $1 million THAAD or Patriot missile. Iran manufactures at scale; America burns money. The cost asymmetry pulls the US toward the one outcome that breaks it: a ground invasion.[4]

Step four: Russia has no choice but to enter. If Iran falls, Russia's southern flank is exposed, its north-south trade corridor is severed, and China's Belt and Road loses its Persian gateway. Putin's personal reception of Iranian Foreign Minister Araghchi in Moscow and his Beijing summit in May 2026, where he and Xi issued a joint statement opposing "unilateralism and hegemonism," are read by Jiang as confirmation that Russia has entered the chat. Jiang predicts Russia will supply Iran via the Caspian Sea, pull China into the war through Belt and Road logistics, and place Iran under its nuclear umbrella, negating any US or Israeli tactical nuclear option.[5]

Step five: domestic collapse follows. A ground invasion triggers a national draft, Vietnam-style protest, and civil war between the "America First" movement and the military-industrial establishment. The political breakdown forces US retreat from the Middle East. With America bleeding internally, Russia and China providing Iran a lifeline, and Europe forced to enter on the American side to protect its energy supply, the conflict goes genuinely global.[6]

The 80-90 percent figure is Jiang's qualitative summary of this chain. It is not derived from a calibrated probabilistic model. It is what you get when you accept all five steps as near-certainties and multiply them together in your head.

There are internal tensions worth naming. In June 2025, Jiang described China as something the war could "sort of discount," because China has no grand strategy and is culturally isolationist. By May 2026, he was saying Russia could "bring the Chinese into the war" via Belt and Road. These positions coexist in the corpus without reconciliation.[7] Separately, he frames Trump alternately as a destroyer of empire pursuing a third term through war chaos and as a mere vehicle of the National Defense Strategy who lacks agency. Both readings appear in his lectures; only one can be primary.[8]

The Strait of Hormuz is the hinge in Jiang's physical argument. Twenty percent of world oil supply passes through a channel thirty-three kilometers wide, and Iran controls the shore on one side. Japan, on Jiang's telling, has eight to nine months of oil reserves if the strait closes, after which the economy collapses, forcing Tokyo to take sides. Venezuela surrendered on January 3, 2026, which Jiang cites as Trump's proof of concept: rapid decapitation works. The error, he argues, is that Iran is not Venezuela. The topography alone, Iran's mountainous terrain versus Iraq's flat desert, makes a 2003-style ground sweep impossible.[9]

And the oil refinery fires, forty-five incidents across forty-five days in April and May 2026, hitting Russia, Myanmar, Australia, Romania, and India: Jiang cites them as evidence of a covert global energy war already spreading. He acknowledges he cannot attribute responsibility and concludes it is "probably both" Washington and Moscow conducting sabotage simultaneously. This is the most contested piece of evidence in his chain: he is using events he cannot attribute as proof of a thesis that requires knowing who is doing them.[10]

Worth naming before proceeding: by July 2026, the empirical record had already begun to cut against at least two of the five steps. Step four, Russia's entry as a co-belligerent, is contested by the evidence examined in Chapter 8. The specific expansion mechanism required by step five, an ally formally joining the conflict against the United States, did not materialize. The Wider Field section below documents why. The five-step chain is laid out here as Jiang presents it; its standing against the record is what the rest of this chapter assesses.

# Zeihan's Rival Lens

Peter Zeihan has been answering the world-war question since his first book in 2014, and his answer has not changed.

In *The Accidental Superpower*, he set out the foundational distinction: the end of the American-guaranteed global order produces not a unified global conflict but a fragmented scramble. Countries will scheme and maneuver against each other, but "for the most part they will not be plotting, scheming, and maneuvering against the United States." The disorder is characterized by what he calls wars of opportunism: regional competitions that the postwar architecture suppressed simultaneously, now releasing separately and at different scales and times.[11]

In *The End of the World Is Just the Beginning* in 2022, he made the same point more bluntly: "Messy stuff, yes, but it won't quite be a world of all-against-all." The outcome he predicted was regional blocs, a Japanese-led Northeast Asia, a French-dominated far Western Europe, a Turkish Eastern Mediterranean, a German Central European sphere, each asserting separate paxes and colliding at the margins through trade competition and privateering, not through a coordinated global war.[12]

The 2026 videos apply this framework to the live conflict and do not revise it upward. On the specific expansion vectors Jiang relies on:

China did not join. Zeihan explains the structural reason clearly. China imports 80 percent of its crude oil, and 75 percent of that comes from the Persian Gulf, where the US Navy is now concentrated. A Chinese military move during the Iran war would invite the United States to shut off China's energy supply. The deterrence is not a choice: it is arithmetic. Zeihan's summary in his May 21, 2026 video on whether now is a good time for China to invade Taiwan is characteristically flat: within a year China would collapse into something post-apocalyptic.[13]

Russia assisted Iran but did not enter the war. Russia provided satellite targeting data that enabled Iran to strike Prince Sultan Air Base and kill US personnel. Zeihan described this in his April 7, 2026 video as "America's oldest adversary deliberately sharing tactical information on American military hardware and personnel," a deeply significant act. But he frames it as an intelligence war, not a military entry. The Trump administration did not respond militarily against Russia, and Russia did not commit forces.[14]

No allies joined the US. Zeihan's July 14, 2026 video, "Why Nobody Came to Help the U.S. in Iran," explains the structural reasons: most allies lack long-range naval projection capacity, the war was launched without consultation, and participating hurt their own economies. The countries with capacity, Japan, France, the United Kingdom, chose not to come. This is not a temporary absence. It is the post-Bretton Woods baseline.[15]

By early July 2026, a notional ceasefire existed. It was a bad ceasefire: Iran was charging $2 million per vessel to transit the Strait of Hormuz, operating an extortion racket from the ruins of a war it did not win cleanly. Zeihan describes it as "an ongoing catastrophic economic and strategic event for the world as a whole, for the United States specifically." A massive strategic loss. Not a world war.[16]

The larger point Zeihan makes is structural: the real systemic transformation is not the Iran war itself but the collapse of the WTO, which he addressed in his April 10, 2026 video. The WTO's effective end dismantles the multilateral trade adjudication framework that underpinned globalization since 1998. That produces "a lot of conflicts among states, within states" over thirty to forty years. Not one world war, but a long, ragged disaggregation.[17]

Where do they agree? Both recognize the Iran war occurs within a collapsing American hegemony and carries severe global consequences. Both recognize Russia is actively working against US interests. The difference is interpretive: Jiang reads all of this as escalatory toward a unified global war; Zeihan reads it as confirmatory of fragmentation into separate regional crises that share a common cause, the Bretton Woods collapse, but do not constitute a single unified conflict.

# The Wider Field

The outside view here is unusually well-documented, because the question of WWIII probability has attracted serious quantitative attention since at least the Ukraine invasion of 2022, and the Iran war has now given every platform a live test case.

The Bulletin of Atomic Scientists moved the Doomsday Clock to 85 seconds to midnight in January 2026, the closest it has ever been set. The board cited three simultaneous regional conflicts involving nuclear powers: Russia-Ukraine, India-Pakistan, and the US-Israel attacks on Iran. Its language is carefully worded: "escalation risks are rising," "negative trends intensified." It is a warning about trajectories. It does not assert that world war is underway or assign it a high probability.[18]

SIPRI's Yearbook 2026, published in June, records that interstate armed conflicts doubled from three in 2024 to six in 2025. SIPRI's framing is explicitly plural and discrete, multiple regional wars, not one unified global war. The finding about states "increasingly relying on nuclear weapons as instruments of national power" is alarming on its own terms but does not translate into an 80-90 percent WWIII estimate.[19]

The RAND Corporation convened a panel in March 2026 with three named analysts, Maria Snegovaya on Russia, Brian Hart on China, and Victor Cha on North Korea, specifically to assess great-power military entry into the Iran conflict. Their conclusions: Russia is overextended and its January 2025 security treaty with Iran notably lacks a mutual defense clause, which Snegovaya reads as deliberate; China prefers economic and diplomatic tools and is "much more comfortable and prepared to sit back and let the United States engage"; North Korea may supply missiles transactionally but will not commit forces. Overall assessment of the panel: low probability of immediate WWIII-type escalation.[20]

The Peterson Institute's May 2026 analysis independently corroborates RAND. Russia provided satellite imagery on American troop positions and likely advised on drone tactics but stopped short of direct military action, partly because Ukraine still consumes its capacity. Russia was gaining $45 to $151 billion in additional 2026 revenues from elevated oil prices, making restraint financially optimal. China secured oil flows through direct diplomacy and renminbi transactions. The authors describe Russia and China as "fair-weather partners" to Iran: transactional, not ideological. Their conclusion on direct intervention risk: not significant.[21]

The Atlantic Council published a scenario paper in April 2026 outlining four post-Iran-war trajectories. The modal near-term outcome is described as "an uneasy, inconclusive peace." The most dangerous scenario, Scenario 4, involves China providing substantial indirect support, including intelligence, surveillance, logistics, and coordinated pressure in the Taiwan Strait, which the authors say would "transform a regional war into a global inflection point." They treat this as conditional and non-modal. Not the baseline. And they add the structurally honest caveat that "inconclusive endings to conflicts of this magnitude rarely stay inconclusive." The July 8 collapse of the June 17 Memorandum of Understanding partially validates that caution.[22]

Now for the numbers.

War3.ai, a real-time probabilistic model tracking multi-theater major-power war, as of July 16, 2026: 9.18 percent. The Iran-Israel escalation risk is the single largest upward driver on the model at that moment, contributing 2.79 percentage points, roughly 28 percent of the total risk signal. The model defines its question as a multi-theater war involving major powers within the next twelve months: a higher bar than the current US-Iran conflict, but exactly the bar Jiang's claim requires.[23]

OrreryX composite risk index, April 2026: 61 out of 100. The platform explicitly states this is not a probability: it is a structural risk metric indicating "the structural conditions that enable large-scale conflict are more aligned than at any time since the peak of the Cold War." The analysts' derived probability estimate from this index: 5 to 15 percent probability of a major multi-power conflict within the next decade. Iran nuclear breakout scores 71 out of 100 on their individual flashpoint scale, third behind India-Pakistan and Russia-NATO.[24]

Metaculus community forecasting gives NATO-Russia war approximately 3 to 5 percent per year. Long-horizon great-power war before 2050, revised upward after the Ukraine invasion, sits at roughly 20 to 25 percent. These figures address great-power war generally, not Iran-triggered WWIII in particular.[25]

80,000 Hours, in its great-power conflict problem profile, estimates approximately 30 percent probability of a war between great powers before 2050, defined as a conflict with at least 1,000 battle deaths per year on each side among the US, China, Russia, and India. The naive historical base rate from frequency, roughly two general wars per century, implies about 80 percent over eighty years; the 30 percent figure reflects adjustment downward for nuclear deterrence, democratization, and economic interdependence.[26]

Chatham House, across its February-to-June 2026 analyses, found that great powers are "more likely to calibrate their involvement carefully rather than commit to open-ended escalation." Its most prominent finding is not about world war probability but about nuclear proliferation risk downstream: the Iran war may trigger a new wave of proliferation as regional states recalculate the deterrence math.[27]

The modal outside view, synthesized: the Iran war is a high-stakes regional conflict with genuine global consequences in energy, proliferation risk, and US strategic overextension, but it is not currently a world war, and no institution or professional forecaster surveyed assigns it anything close to an 80-90 percent probability of becoming one. The professional consensus clusters at single digits for the twelve-month horizon and in the 20-30 percent range for multi-decade great-power war more broadly.

The closest any source comes to Jiang's range is OrreryX's 61/100 structural index, which its authors explicitly convert to a 5-15 percent decade-long probability. That is still four to five times below Jiang's lower bound.

# Assessment

The sourced claims end here.

Zeihan's counter-thesis here is "regional fragmentation, not world war," a position he has held since 2014 and restated in 2022. His structural framework is directionally credible, but his forecasts of rapid deglobalization overshot on timing in both those iterations. It has not arrived on his own schedule. That timing exposure is relevant when weighting his counter-thesis against Jiang's escalation claim.

Jiang's 80-90 percent figure deserves a serious accounting rather than dismissal, because the underlying concern about escalatory dynamics is real. The Doomsday Clock at 85 seconds, SIPRI's doubling of interstate conflicts, War3.ai at its highest recorded reading: these are not noise.[28] The structural danger is genuine. What is not genuine is the probability assigned to it.

The claim fails on three specific counts.

First, the gap between structural risk and assigned probability. OrreryX reads structural conditions as the most dangerous since the Cold War peak and translates that into a 5-15 percent decade-long estimate. War3.ai integrates live conflict signals including the Iran war and produces 9.18 percent at twelve months.[29] For Jiang's 80-90 percent to be correct, these calibrated models would need to be off by a factor of eight to nine on the downside, which would require systematic and severe misspecification on every input simultaneously. That is possible but requires an argument. Jiang provides instead an assertion that his reasoning chain makes global war nearly certain.

Second, the expansion mechanism. Jiang's claim requires at least one additional great power to enter direct combat against the United States. The RAND panel's conclusion in March 2026, corroborated by the Peterson Institute's May 2026 analysis, is that Russia is militarily overextended and financially incentivized to stay out, and China is structurally deterred by its energy dependency on the very waters the US Navy now controls.[30] The July 14, 2026 "Why Nobody Came" finding from Zeihan is not just an observation: it is an explanation. The structural reasons no ally joined the US are the same structural reasons no power joins Iran. Capacity is the binding constraint, and it operates on both sides.

Third, the probability is circular. The 80-90 percent figure does not emerge from a model; it summarizes the reasoning chain. But that chain has gaps that are labeled in the source itself: "no choice" inferences, asserted incompatibilities, the acknowledged inability to attribute the refinery fires. A reasoning chain is not a probability model. Summarizing an argument by recycling its conclusion as a percentage is not calibration.

What Jiang gets directionally right: that the Iran war is the single largest near-term escalation driver in the world; that US strategic overextension creates real opportunity for rival powers; that the eschatological framing of multiple players, Shia martyrdom theology, Jewish Zionist statecraft, Christian evangelical identification with Israel, creates a political environment in which domestic pressure for escalation is unusually hard to contain. These are genuine structural pressures. The Atlantic Council said as much when it warned that inconclusive wars of this magnitude rarely stay inconclusive.[31] The July 8 MOU collapse, fresh ceasefire negotiations collapsing into resumed strikes, shows the conflict is not locked in a stable equilibrium.

But genuine structural pressure at 9-15 percent is not 80-90 percent. The distance between those numbers is not a rounding error. It is the difference between a structurally dangerous situation and a near-certainty of civilizational catastrophe. Jiang conflates the two because his method, which is to derive outcomes from grand strategies and grand strategies from civilizational commitments, has no mechanism for pricing deterrence, resource exhaustion, or mutual calculation. In his framework, strategies collide and escalate by internal logic; the real-world friction that slows and stops escalation, miscalculation costs, nuclear deterrence, economic dependency, domestic political limits on war-making, enters the analysis only as obstacles to be overcome rather than as inputs that shape the probability.

The warning Jiang's claim contains is worth hearing. The number it wears is not.

The evidence is contested, confidence moderate. The falsifying event: a second major power, Russia or China, commits uniformed forces to direct combat against the United States in a theater connected to the Iran war, transforming the conflict from regional to multi-theater within twelve months of July 2026.

# CHAPTER 10: RUSSIA TAKES ODESSA

Jiang has a name for the mechanism: The Grain Chokehold.

The claim is clean on its face: Russia takes Odessa, seizes full Black Sea control, grabs leverage over roughly a third of the world's carbohydrates, and ends the Ukraine war on its own terms. The mechanism is geographic. Odessa is the major port. Whoever holds it controls Ukraine's maritime lifeline. Once the lifeline is cut, the war is over because Russia has achieved its strategic objectives and has zero interest in absorbing Western Ukraine, which would become a welfare-state charity case for Brussels.

Jiang has said this since mid-2025. The question is whether the ground in southern Ukraine agrees.

## Jiang's Prediction

Jiang presents the Odessa conclusion as the war's inescapable destination, not as speculation. The reasoning runs through geography, then resource logic, then an eschatological frame that even he describes with some skepticism, while deploying it anyway.

The geographic step is straightforward. Russia already controls most of eastern Ukraine, which is the agricultural and industrial heartland. Western Ukraine is useless to Moscow. The missing piece for a complete strategic package is the Black Sea outlet. Odessa is that outlet. Ergo, Odessa is where the war ends.[1]

The resource logic follows from geography. Jiang's figure, cited consistently across his April 2026 and May 2026 source material, is that Russia and Ukraine together export roughly one-third of the world's carbohydrates, meaning grain and fertilizer inputs combined. Once Russia holds Odessa and can therefore control all trade moving through the Black Sea, it holds a gun to the heads of Africa and the Middle East. Jiang makes this point without theatrical embellishment: "If Russia willed it, Africa would starve to death."[2] The leverage is the whole point. It is not about feeding Ukrainians. It is about having an instrument of global coercion.

The political logic completes the chain. NATO understands that Odessa's fall ends the war, so NATO reinforces Odessa as its final defensive position. France, Britain, Romania, Poland, Turkey all get drawn in. And here the analysis becomes a forecast of European political collapse: Russian artillery and encirclement capabilities decimate NATO forces; European publics, baffled as to why their children are dying on a Ukrainian coastline, explode in political fury. Civil unrest, political revolution, possibly civil war in France and Britain, governmental upheaval in Germany and Turkey. The last stand at Odessa is, in Jiang's framing, a death trap.[3]

Jiang pushes the scenario further into prediction and then speculation territory, which the source material is honest about labeling as such. The Turkish implosion, he suggests, allows Russia to restore Constantinople to the Greeks, fulfilling an Orthodox prophecy attributed to a Greek monk named Paisios of Mount Athos, and completing what Jiang reads as the Third Rome project embedded in Alexander Dugin's 1997 *Foundations of Geopolitics*.[4] He is careful to note the Paisios prophecy may have been planted by Russian intelligence and that he does not personally vouch for its authenticity. He uses it anyway as an explanatory frame for what he believes is Putin's guiding orientation.

Two internal tensions in Jiang's scenario are worth noting. First, his earlier counterfactual argued that without NATO intervention, Ukraine would likely have collapsed via Russian encirclement within six months. In the actual timeline, NATO's intervention paradoxically trained the Russian military into a more capable force. The destination is still Odessa, but the mechanism differs depending on which version you are reading. Second, the epistemic status of the prediction hardened across recordings. In July 2025 Jiang explicitly labeled the Odessa thesis a "hypothesis" and said he expected to be wrong about a lot of things. By May 2026 the same claims were presented as analysis-derived predictions, with notably less hedging, without new evidence being introduced.

The carbohydrate figure is never externally sourced in Jiang's presentation. He states it as a known quantity. Whether it is accurate matters for the leverage claim. We will check it below.

# Zeihan's Rival Lens

Now the other map.

Zeihan does not present a rival theory about Russia and Odessa. His position as of July 2026 is more fundamental than that: Russia taking Odessa is not a scenario because Russia is currently losing the military and logistical struggle in the south, not winning it.

Start with the Black Sea Fleet, because that is where the story begins to diverge sharply from Jiang's picture. The Russian fleet evacuated from Crimea after Syria's fall in late 2024, exiting through the Turkish Straits under the Montreux Convention, which prohibits warship passage through the Bosphorus during wartime for belligerent states. The fleet cannot legally return while the war continues. It sits at Novorossiysk. Ukrainian naval drones have made even that base dangerous.[5]

By June 2026, Zeihan describes Crimea itself as effectively isolated. Russian forces cannot reliably resupply the peninsula by land or sea. Ukrainian strikes have severed the supply corridors. Civilian fuel sales in Russian-occupied Crimea were suspended as of June 30, 2026. The Kerch Strait bridge handles only light civilian traffic.[6] Roughly two-thirds of Russia's territory captured since 2014 has become, in Zeihan's phrase, "a sandbag that the Russians cannot reliably resupply."

The weapons equation is not helping Moscow either. Ukraine struck Russia's primary semiconductor facility at Voronezh in June 2026, which Zeihan argues will accelerate a qualitative collapse in Russian conventional weapons output. His stated production ratio as of July 1, 2026: Russia is producing replacement military gear at one-fifth to one-twentieth the rate of consumption.[7] And in the drone count that determines who controls the battlefield as of July 15, 2026, Ukraine is producing approximately 13 drones for every 10 Russia produces, with Ukrainian models deploying memory technology that selects targets autonomously and cannot be effectively jammed.[8] Zeihan calls the Russian front "breaking down" and describes summer 2026 as potentially decisive, with Ukraine holding the military momentum.

On grain and food leverage, Zeihan's framework does not link grain control to Odessa's capture. His 2022 book identifies southern Ukraine as part of what he calls "arguably the most productive part of the Russian wheat belt" and acknowledges Russia's historical ability to interfere with Ukrainian grain exports through geopolitical dominance over the former Soviet wheat belt generally. But this is a deglobalization dynamic, not a battlefield conquest scenario. The 2022 framing treats Russian grain leverage as a long-run consequence of systemic breakdown, not something Russia achieves by taking a port city.[9]

His position on war termination is explicit and has not shifted. Trump's 28-point peace plan of December 2025 was "probably unworkable" and "almost certainly not" going anywhere.[10] Putin's actual demands require the dissolution of Ukrainian armed forces, which amounts to requiring the dissolution of the Ukrainian state. Zeihan assessed the March 2025 ceasefire discussion by noting Putin violated the energy infrastructure halt within three hours of agreeing to it. As of July 2026 the war is not approaching conclusion on Russian terms. The dynamic, in Zeihan's reading, is running in the other direction.

The geographic imperative overlap between Jiang and Zeihan is real but limited. Both understand why Odessa matters. Both recognize that control of the Black Sea coast is a Russian strategic goal rooted in its structural security requirements, articulated in Zeihan's 2014 book as far back as the immediate post-Soviet period. The overlap ends there. Jiang concludes Russia will achieve this goal. Zeihan's current position is that Russia is failing to hold what it already has.

# The Wider Field

The independent research picture is consistent across institutions: Russia will not take Odessa in the near to medium term, the war will not end because of an Odessa capture, and the grain leverage claim requires significant calibration.

ISW, tracking Russian offensive operations with geolocated sourcing daily, published two relevant assessments. In April 2026 it found that Russian forces had "failed to complete any of these reported operational objectives" regarding Mykolaiv and Odessa oblasts, and critically, that Russia had been "unable to restore operational maneuver to the battlefield," which is the prerequisite for the kind of strategic breakthrough needed to reach Odessa from current front-line positions.[11] By June 2026, ISW found that Russian forces had gained only 7.87% of the territory in the December 2025 to May 2026 period that they had gained in the same period one year earlier.[12] Odessa does not appear as an imminent operational concern in the June 2026 assessment.

CSIS confirmed in September 2025 that a map displayed behind Russian Chief of the General Staff Valery Gerasimov showed Moscow's aspiration to seize Odessa and Kharkiv oblasts. The aspiration is documented. CSIS's operational judgment: Odessa is a "long-range aspiration, not a near-term operational plan."[13] Their four war-end scenarios (forever war at lower intensity, ceasefire requiring Ukrainian escalation, Russian breakthrough described as unlikely but possible, and full peace agreement as least likely) are none of them premised on Russia capturing Odessa.

Naval analyst H. I. Sutton published a detailed assessment in April 2026 finding that Russia's Black Sea Fleet had lost approximately 30% of its vessels, some 24 to 29 ships, to Ukrainian drone and missile strikes.[14] The fleet rarely leaves Novorossiysk. Sutton notes the asymmetric logic: Russia must defend against every drone swarm; Ukraine only needs occasional successful strikes. The naval capacity for a maritime approach to Odessa has been systematically eroded.

Ukrainian Armed Forces Commander Syrskyi's year-end 2025 statement addressed the Odessa question directly. Russia's 2025 plans had included reaching Odessa "to cut us off from the sea entirely." His assessment: Ukraine's armed forces had "thwarted these plans." He separately confirmed the Russian Black Sea Fleet's "presence in the Black and Azov Seas has been practically neutralized," with the fleet confined to Novorossiysk.[15]

The one prominent Western military figure who shares Jiang's reading of Odessa's strategic centrality is General Wesley Clark. Speaking via Espreso TV in April 2025, Clark argued Russia's "true strategic goal remains Odesa" and that capturing it "would mean the end of the war and a de facto victory."[16] Clark is a genuine outlier within the mainstream analytic community and arrives at this conclusion from the opposite orientation to Jiang: he frames it as a danger Ukraine must prevent, not an outcome Russia will achieve. He also cautioned that Ukraine "does not have enough resources to exhaust Russia's military machine," implying the scenario is possible, not imminent.

Seven war scenarios from GLOBSEC, drawn from 71 Ukrainian defense and foreign-policy experts (published May 2026), collectively assigned 75% probability to military-continuation scenarios versus 25% for peace scenarios.[17] The leading single scenario is "War of Attrition with Lowered Intensity." No scenario identifies Russian capture of Odessa as a war-termination trigger or near-term outcome.

Chatham House (May 28, 2026) and Carnegie (Alexander Baunov, February 2026) agree on a related point: if a ceasefire does materialize, it will likely be rushed, poorly defined, and exploited by Russia to regroup. Carnegie's Baunov frames Putin's actual objective as "political subjugation of Ukraine, regime change, neutralization of Ukrainian statehood," not any specific city.[18] Odessa is not being negotiated. The 2026 Geneva trilateral talks focused on Russian demands for full Donetsk cession. Odessa was not a reported subject of negotiation.

Prediction markets priced ceasefire-by-end-2026 at roughly 25.5% on Polymarket (with $14.5 million in total trading volume) and approximately 40% on Metaculus with 138 forecasters contributing.[19] Neither platform found enough confidence in an Odessa-capture scenario to run a dedicated contract.

On the grain figure specifically: FAO data establishes Ukraine at roughly 10% of global wheat exports and 12% of global corn exports, with approximately 27% of global sunflower oil output, all pre-war figures.[20] USDA ERS confirms Ukraine ranked ninth globally in wheat production as of 2024.[21] The "one-third of world carbohydrates" figure that Jiang uses is not supported by any primary institutional source when applied to Ukraine alone. It only approximates reality when Russia's own export volumes are combined with Ukraine's. Russia is the world's largest single wheat exporter, and together the two countries represent close to one-third of global wheat trade, which makes Jiang's figure approximately defensible as a combined Russia-Ukraine claim. As a claim about what Russia gains by capturing Odessa, however, it conflates Russia's pre-existing export capacity with the leverage Russia would acquire through territorial conquest.

The CFR published a February 2024 piece documenting Ukraine's unilateral Black Sea corridor, established after Russia terminated the UN Black Sea Grain Initiative in July 2023, and finding it had moved 162 million tonnes of cargo across 55 countries.[22] Odessa handles roughly 85% of Ukrainian sea exports through shallow-water western Black Sea routes where Russian submarines cannot effectively operate. Russia's current strategy against Odessa, confirmed by Al Jazeera and

Ukrainian military analysts, is aerial and maritime attack on port infrastructure, not preparation for ground assault.[23]

# Assessment

Here is the model’s judgment.

One calibration note on Zeihan before proceeding: he has been describing Russian military breakdown as imminent since 2022, and the war has run longer and at higher cost than his model predicted. His predictions of Russian strategic collapse have not resolved on his timeline. His current readings on the Black Sea Fleet and the southern front are credible and evidence-based, but they come from a framework with a documented timing exposure on this specific theater.

Jiang’s prediction chain has a real geographic logic and a real strategic logic running underneath it. The geographic imperative is genuine: Russia identified Odessa and the Black Sea coast as a security requirement at least as far back as the Soviet collapse. This is not invented or paranoid; it is documented in Russian strategic thinking. Zeihan’s own foundational work confirms it. The grain leverage, even if the “one-third” figure overstates Ukraine’s individual share, reflects a real structural reality about the Black Sea region’s significance to global food markets. The Black Sea Grain Initiative moved 33 million tonnes in its single year of operation. More than 400 million people depended on Ukrainian foodstuffs before the invasion.[24] This is not a negligible lever.

The problem is that a strategic logic and an operational capacity are different things, and Jiang’s prediction chain requires both. As of July 2026, the operational evidence runs against it on every axis. Russia’s Black Sea Fleet is degraded by approximately 30% and confined to Novorossiysk by a combination of Ukrainian drone strikes and the Montreux Convention’s wartime passage restrictions. The Russian front line is in Donetsk and eastern Zaporizhzhia, not on any axis approaching Odessa across the Dnipro River and several hundred kilometers of defended territory. The rate of Russian territorial advance in the winter-spring 2026 campaign period fell to less than 8% of the prior year’s pace. Russia is producing replacement military equipment at a fraction of its consumption rate.

The war-termination claim is the weakest link. No mainstream peace-scenario framework currently treats Odessa as a war-termination trigger. Carnegie's Baunov notes that Putin's actual demands extend to the political dissolution of Ukrainian statehood, which is not satisfied by capturing a single port city regardless of that port's strategic value. A Ukrainian government that agreed to cede Odessa would face domestic political consequences far more severe than the ones Jiang predicts for European governments that fail to defend it.

Where Jiang is on stronger ground is in the longer structural arc. Russia's desire for Odessa is genuine and durable. A war that freezes where it currently sits leaves Crimea in a difficult logistical position. The question of whether and when Russia regains the capacity to push further south remains open. But "Russia wants Odessa" and "Russia will take Odessa in the near term" are different propositions, and Jiang treats them as equivalent by running strategic logic and operational forecast together without distinguishing between the two.

The prediction also hardened in tone without new supporting evidence, which is an epistemic tell. When a hypothesis becomes a forecast without a documented evidentiary upgrade, the analyst is often drawing on narrative momentum rather than updated data. That appears to be what happened between Jiang's July 2025 "hypothesis" framing and his May 2026 flat prediction. The underlying evidence did not improve; the framing did.

The Grain Chokehold names a real structural mechanism. The mechanism exists. Whether Russia acquires the lever before the broader strategic environment shifts is the operative question, and as of July 2026 the operational evidence assigns that a low probability in the near term.

The evidence is weak, the confidence moderate. What changes it: Russian forces cross the Dnipro in strength, establish a sustained axis of advance toward Mykolaiv or Odessa, and restore operational maneuver in the southern theater.

# CHAPTER 11: GREATER ISRAEL

The named concept for this chapter is Pax Judaica. It enters here as a territorial frame, not a metaphor. Jiang means it literally: Israel will come to control, or effectively govern, the land stretching from the banks of the Nile River to the Euphrates. All of Syria, all of Jordan, Lebanon, parts of Saudi Arabia, parts of Turkey. A corridor of dominance that has not existed as a single political unit since the Assyrian empire. And by Jiang's account, it is not a fantasy. It is the plan.

So let us look at the plan.

## Jiang's Prediction

The anchor claim, repeated across at least six separate episodes spanning June 2025 to May 2026, is this: once the United States is forced to retreat from the Middle East, the American military infrastructure there, the network of bases and command relationships that constitute CENTCOM, Central Command, does not dissolve. It transfers.[1] "The American military will now become absorbed into the nation state of Israel, making Israel the de facto hegemon of the Middle East."[2] The phrasing shifts slightly across the episodes, "absorbed," "transferred," "merges with," but the structure is identical each time.

This is the fulcrum on which everything else in the chapter rests. If the US retreats and CENTCOM transfers, everything downstream follows mechanically. If it does not, nothing else in the sequence holds.

The reasoning chain Jiang constructs has eight steps, though several of them are asserted rather than demonstrated.

Step one: Israel's grand strategy is the Greater Israel Project, derived from the biblical covenant in which Yahweh promised Abraham the land from the Nile to the Euphrates.[3] A powerful faction within Israel takes this literally and acts on it. Jiang treats the jump from religious text to state strategy as self-evident. He does not source a named decision-maker, a government document, or a military plan. It is an assertion.

Step two: the main obstacle to Greater Israel is not Iran or the Arab states. Those are too weak. The main obstacle is the American military, which currently occupies the very land in question through its bases. “In the Greater Israel project, the Americans control the land of Greater Israel, the Middle East. These are American bases.”[4]

Step three: Israel engineered the US-Iran war precisely to destroy American power in the region. The mechanism is Israel’s influence over US political and financial elites, the Mossad, and Christian Zionist networks, used to push the United States into a ground war it cannot win. Jiang is explicit: “You use this war against Iran to destroy the American Empire. How? By forcing the American Empire to go and invade Iran.”[5] This step is circular. Israel’s intention is inferred from the predicted outcome, not from documented evidence of Israeli decision-making.

Step four: the US uses ground troops, gets bogged down, faces draft resistance and civil unrest at home, and is forced to retreat. This links directly to the WWIII prediction from Chapter 9.

Step five: the retreat does not mean American military assets disappear. They transfer. This is the mechanism that Jiang never explains. He does not describe the legal, political, or operational pathway by which US bases pass to Israeli command. The digest flags this explicitly as a gap: the mechanism of CENTCOM transfer is unexplained.

Step six: with CENTCOM absorbed and rivals destroyed or weakened, Israel becomes sole regional hegemon. The GCC economies will be deliberately collapsed. “The intention is to collapse their economies and make them irrelevant.”[6] Turkey is the last remaining obstacle and will be drawn into the war and crushed. Jiang on this point is emphatic: “After Iran, Turkey is next.”[7]

Step seven: Greater Israel as territory becomes Pax Judaica as governance. Control of oil, the India-Middle East-Europe trade corridor, and AI infrastructure converts territorial empire into a global surveillance architecture headquartered in Jerusalem. Capital and technology companies, Nvidia, Oracle, Microsoft, Google, relocate to Israel.[8]

Step eight: eschatological convergence. Jewish messianism, Christian Zionism, Freemasonry, and Orthodox Christian prophecy all converge on the same predicted outcome. Jiang treats this convergence as probabilistic evidence. The more belief systems point at the same predicted event, the more likely it is to occur.

Now. The evidence Jiang offers for these claims.

He cites the Israeli flag. The two blue horizontal lines represent the Nile and the Euphrates, encoding the territorial ambition in plain sight.[9] The flag's own documented history attributes the stripes to the Jewish prayer shawl, the tallit. Jiang does not engage with this alternative account. He cites IDF unit insignia that he says bear the Greater Israel map, though he names no specific unit.[10] He cites the US wars in Iraq, Libya, and Afghanistan as circumstantial evidence that America was pursuing the project on Israel's behalf. He cites Isaac Newton's prophetic chronology of the Book of Daniel. He cites the sacrifice of "perfect red heifers," which he notes are sourced to "rumor."

The register tags here matter. The core territorial claim is PREDICTION. The US-as-enemy claim is PREDICTION / SPECULATION. The entire reasoning chain rests on an asserted step, the biblical covenant as operating grand strategy, that Jiang himself acknowledges is not argued: "ASSERTED, not argued."

Three internal contradictions worth noting.

First: Jiang oscillates between two framings that cannot quite coexist. In his December 2025 episode he says the Greater Israel project is not about Israel as a nation-state but about "an alliance of transnational capital, multinationals like Google and Meta and intelligence agencies that will be based in Jerusalem." In the Game Theory episodes that precede and follow, he describes a straightforwardly territorial Israeli nation-state empire. He does not resolve the tension.

Second: Iran's fate is inconsistent across episodes. Across adjacent dates Jiang says Israel needs to destroy Iran, then says Israel does not need to destroy Iran because Persia is outside the Greater Israel map, then describes Persia as rising after the war. Three incompatible positions on the same question in three adjacent episodes.

Third: In March 2026, Jiang staked his credibility publicly on one falsification condition. "If they do not destroy the Al-Aqsa Mosque and if they are able to achieve peace, then my predictive model, my analysis is completely wrong. You can just ignore me."[11] In subsequent episodes through June 2026, the framework continues unchanged. No falsification test has been applied.

## Zeihan's Rival Lens

Zeihan does not develop a Greater Israel thesis. Full stop. No video in the source corpus, no chapter in either *The End of the World Is Just the Beginning* (2022) or *The Accidental Superpower* (2014), uses the term CENTCOM in connection with Israel absorbing that role, or describes Israel as a plausible post-American hegemon.[12]

This is a recorded silence on the specific CENTCOM-transfer claim. What Zeihan does discuss, consistently and at length, is a different framing of the regional power question, and it runs in the opposite direction from Jiang's.

For Zeihan, the post-American regional power is Turkey. Not Israel. The 2022 book is explicit: "Turkey was already going to emerge as the master of the Eastern Mediterranean. It will use its superior land quality, mild climate, and command of the region's oil and trade flows not only to keep its agricultural system running, but also to extract geopolitical concessions from Azerbaijan, Georgia, Greece, Iraq, Israel, Lebanon, and Syria."[13] Israel appears on that list as a country from which Turkey extracts concessions. Not the other way around.

The 2014 book lists Turkey as a "rising star," among the countries that will thrive under the harshest post-American circumstances.[14] This framing has been consistent for twelve years.

On Israel specifically, Zeihan's position in June 2025 is terse and structural: Israel "can't look after their security themselves. They're too small. They're too dependent on energy imports. They're too dependent on food imports. They're too dependent on technology imports."[15] In the context of US withdrawal, Israel's strategic imperative is to find a partner, not to absorb a vacuum. The most obvious and necessary partner is Turkey.

On Turkey's material position: "an industrial base that outproduces every other country in the region combined," "a GDP roughly the same size as every other country in the region combined," "a military that's more powerful than every other country in the region combined, the second-largest army in NATO after the United States."[16] This was stated in June 2025 and has not changed.

As of July 14, 2026, Zeihan's most recent treatment of the Israel-Iran war describes Netanyahu's role as leveraging US military power to fight Israel's war, not Israel standing independently as a regional hegemon ready to inherit American infrastructure.[17] Israel is presented as a dependent actor, not a successor.

The collision with Jiang's claim is not subtle. Jiang says Israel absorbs CENTCOM and becomes the hegemon. Zeihan says Turkey is already the dominant power and Israel needs Turkey's goodwill to function. Jiang says Turkey is next. Zeihan says Turkey is first. These are not reconcilable through nuance.

# The Wider Field

The research record, as of July 2026, produces a complicated picture worth unpacking carefully, because several components of Jiang's claim land in different places on the credibility scale.

On Israeli strategic ambition: a meaningful cluster of credible analysts accepts that Israel is pursuing something that can legitimately be called regional strategic dominance. Nathan Brown at Carnegie, writing in March 2026, argues Israel has shifted to a doctrine of "dominance, degradation, and debilitation," where war is no longer an instrument toward a political settlement but has become "the arrangement itself."[18] Ali Bakir at the Gulf International Forum in the same month argues Israel seeks "a broader effort to impose Israeli hegemony over the region," using failed states as buffers around its neighbors.[19] Ibrahim Ozturk at ECPS identifies the India-Middle East-Europe corridor, the same trade route Jiang describes as the economic backbone of Pax Judaica, as an explicit component of Israeli strategic design.[20]

But virtually none of these analysts uses the Nile-to-Euphrates frame as a near-term territorial prediction. The dominant framing is strategic hegemony through adversary degradation and alliance cultivation, not absorption of territory from Egypt to Iraq. The most senior Israeli strategists making a maximalist case, Amos Yadlin, former director of Israeli Military Intelligence, and Avner Golov, former senior director of the Israeli National Security Council, writing in Foreign Affairs in

May 2026, explicitly argue for a "Three Seas Order" in which the United States remains "the only credible external security provider."[21] These are not advocates for the Greater Israel territorial program. They are calling for an American-led architecture with Israel as a capable node.

On the CENTCOM question: the actual debate as of July 2026 runs in the opposite direction from Jiang's prediction. Approximately 50,000 US troops remain in the Middle East with no drawdown ordered.[22] The question being actively discussed in military and policy circles is not whether to leave, but whether to move US base infrastructure westward into Israel. The Jerusalem Post reported on July 2, 2026 that CENTCOM is evaluating relocating operational systems from Bahrain, Kuwait, and Saudi Arabia to Israel, following Iranian attacks that inflicted approximately $400 million in damage to the Bahrain base alone.[23] Former CENTCOM Commander General Frank McKenzie endorsed this approach on June 29, 2026, noting CENTCOM had previously proposed it to the Biden administration, which rejected it.[24]

Notice what this means. The debate is about US forces basing inside Israel under continued US command authority, not about Israel inheriting or absorbing the CENTCOM command function. Those are not the same thing. In Jiang's prediction, the direction of authority transfer runs from Washington to Jerusalem: CENTCOM command passes to the IDF. In the actual debate documented as of July 2026, the direction is the opposite: US forces move to Israel while remaining under US command, with Israel serving as a forward operating platform, not a command successor. Jiang's step five is not merely wrong in magnitude; the direction of authority is inverted. Yanir Kapach at INSS, writing in January 2026, calls Israel's five-year integration into CENTCOM "transformational" and notes Israel has moved from being a US assistance recipient to a "regional operational partner."[25] Partner, not successor. The US National Defense Strategy of 2026 designates Israel a "model ally" and shifts burden-sharing toward regional partners, but explicitly maintains US primacy.[26]

On Turkey as the next confrontation: this is the one component where the wider field lines up closest to Jiang's sequencing, though not to his framing. The Nagel Commission, a government-commissioned defense panel chaired by former

National Security Council head Yaakov Nagel, warned in January 2025 that Turkish military expansion in Syria is “liable to deepen the direct danger of Turkish-Israeli hostilities” and that a Turkish-aligned Syria could pose a threat “even more dangerous than the Iranian threat.”[27] In February 2026, former Prime Minister Naftali Bennett publicly declared “Turkey is the new Iran.” By June 2026, the Jerusalem Center for Security and Foreign Affairs was characterizing the Israel-Turkey contest as “a long-term strategic competition.”[28]

Ryan Gingeras at War on the Rocks provided the most granular assessment of Turkey’s military capabilities in May 2026: the Kaan fifth-generation fighter remains in development, only three Altay tanks are in service, and the F-16 fleet lacks needed upgrades due to sanctions.[29] Turkey is not ready to fight Israel, and Israel is not ready to fight Turkey. Both sides established a deconfliction hotline after Israeli strikes on a Turkish-linked airbase in Syria in March 2025.

Asli Aydintasbas at Brookings, writing in June 2026, cautions that Turkey is “reemerging as a central actor in the Middle East, but not as the neo-Ottoman power its domestic rhetoric suggests,” with significant constraints from economic fragility and NATO membership.[30]

The outlier closest to Jiang’s full framing is Jwan Zreiq, writing in Africa Is A Country in March 2026, who applies Achille Mbembe’s necropolitics and the 1982 Yinon strategy to argue that the “hexagon of alliances” Netanyahu has assembled is a governance structure for territorial expansion that maps onto the Nile-to-Euphrates vision.[31] This is a minority position in the literature, contested by mainstream Israeli strategists. Former Israeli ambassador Alon Pinkas called the Turkey-as-Iran comparison “ridiculous,” noting Turkey has never denied Israel’s right to exist.[32]

# Assessment

The model weighs in.

Before using Zeihan as calibration here: his framework assigns Turkey the dominant regional role in the post-American Middle East, a call he has held since 2014. Turkey’s position has strengthened in some respects and stalled in others since then; Zeihan’s timing on Turkish regional dominance has also slipped. His structural case for Turkey over Israel is real and consistent, but it carries the same timing-exposure caveat that applies to all his structural predictions.

Jiang's composite prediction has five components. Their credibility varies considerably, and conflating them is the main analytical error to avoid.

**Component one: Israel pursues strategic dominance after the Iran war.** Substantially supported. Brown, Bakir, Ozturk, and Zreiq all document a real shift in Israeli strategic doctrine toward something harder and more expansive than the pre-2024 posture. This component is the least contested and the most grounded in observable evidence.

**Component two: Turkey becomes Israel's next defined rival after Iran.** Within the range of credible analysis. The Nagel Commission, INSS, War on the Rocks, Brookings, and the Jerusalem Center all treat the Israel-Turkey rivalry as structural and live, not rhetorical. Jiang's sequencing maps onto a real doctrinal shift in Israeli strategic thinking. The divergence from Jiang is that the wider field describes managed competition with escalation risk, not an Israeli military campaign to "crush" Turkey, and all serious analysts regard near-term military conflict as unlikely given Turkey's NATO membership and Israel's capacity constraints.

**Component three: the US exits the Middle East and CENTCOM's role passes to Israel.** Not supported by any mainstream source as of July 2026. The actual debate runs the opposite direction: 50,000 US troops remain in theater, the US is evaluating moving its bases into Israel rather than out of the region, and the strongest institutional voices in Israel are explicitly calling for sustained US primacy. Jiang's prediction about US retreat is a precondition for everything that follows in his chain. That precondition has not materialized and, as of the date of these sources, is not the trajectory being discussed.

**Component four: territorial expansion from the Nile to the Euphrates as near-term policy.** Not supported by any institutional forecaster. The phrase functions in the literature as critical framing used by Palestinian advocates and Israel's opponents, and as a description of fringe domestic Israeli politics. No mainstream analyst projects it as a near-term policy outcome. The Al Jazeera reporting in February 2026 explicitly notes the Nile-to-Euphrates formulation is "more controversial even domestically" than the moderate Israeli consensus around West Bank and East Jerusalem annexation.

**Component five: Pax Judaica as a global AI surveillance world government headquartered in Jerusalem.** No institutional source addresses this. It sits at the SPECULATION end of Jiang's own register tags and has no traction in the forecasting literature.

Where does this leave the prediction as a whole? The directional claim, that Israel's strategic ambition has expanded, that Turkey has become a designated rival, and that the post-American Middle East will be contested and violent rather than orderly, is well within the range of serious analysis. The specific mechanism, CENTCOM transfer, and the specific endpoint, a territorial empire from Egypt to Iraq, are not. The reasoning chain has a structural failure at step five: the mechanism by which US military assets legally, politically, or operationally pass to Israeli command is not described. Without that step, the entire downstream sequence is unmoored.

Jiang placed a stake in the ground himself: Al-Aqsa destruction is his stated falsification test. As of the sources available for this book, the mosque stands. By his own standard, the framework should be revisited. It has not been.

What makes this chapter analytically interesting is not that Jiang is wrong about everything. He is right that Israel's strategic environment improved after the Iran war, right that Turkey has become the named next adversary in Israeli strategic doctrine, and right that the post-American Middle East will be unstable and contested. The problem is the leap from those correct directional observations to the specific prediction: that a country of nine million people, dependent on imported food and energy and flying carrier-free at extreme range, will absorb the largest American military command structure on Earth and govern a territory running from Cairo to Baghdad. That is not a forecast. It is an eschatological projection wearing geopolitical clothes.

Contested evidence, moderate confidence. The test: CENTCOM command authority transferred, in whole or in part, from US to Israeli military command, or the US withdrawing the majority of its approximately 50,000 troops from the Middle East without replacement.

# CHAPTER 12: EAST ASIA IGNITES

The Middle East burns and, while everyone watches, the other side of the world catches fire. That, in its compressed form, is Jiang Xueqin's eighth major prediction: East Asia erupts across three simultaneous flashpoints, each one made possible by the same condition, which is that America is busy somewhere else.

He calls this The Three Flashpoints. Taiwan, the Strait of Malacca, and a North Korean move against Seoul. Three theaters, one window, simultaneous ignition.

The simultaneity is the claim that matters most. Any single flashpoint has been debated for years; the argument that all three light at once, for structural reasons that derive from a common cause, is what makes this prediction distinctive. And, as we will see, more plausible than any of its components taken alone.

## Jiang's Prediction

Jiang presents the three flashpoints in a single interview, on 7 May 2026, as the culminating movement of his East Asia analysis. They are not sequential. They are parallel. The shared mechanism is American imperial overstretch in the Middle East, which has stripped military assets from the Pacific and suspended the deterrence architecture that kept each of these flashpoints cold.

**Flashpoint One: Taiwan.**

China considers Taiwan part of its territory and will attempt to take it over. Japan, for its part, is compelled to resist: Chinese control of Taiwan would sever Japan's sea lanes to Southeast Asian resources and the South China Sea.[1] Japanese PM Sanae Takaichi has said plainly that "Taiwan is core to Japanese strategic interests," and Jiang treats this as a declared commitment, not rhetoric.[2]

There is a complication in Jiang's own framing that the source documents faithfully. In the same May 2026 interview, he also predicts that Trump may declare support for Taiwan-China reunification, transferring the deterrence burden to Japan and South Korea without US backing.[3] By July 2026, he states outright that a Chinese military invasion of Taiwan would falsify his entire model, calling it essentially impossible on cultural and democratic grounds.[4] The Taiwan flashpoint, then, is not necessarily a PLA amphibious assault. It is more likely a Chinese soft takeover or coercive-pressure campaign that forces Japan into confrontation without US cover.

Jiang never explicitly reconciles these framings, which is a genuine weakness in the argument. But the implied resolution, Japan vs. China over Taiwan without US backing, is a coherent scenario and may be more dangerous than a direct US-China confrontation, since Japan's deterrent calculations are less studied and less stable.

**Flashpoint Two: The Strait of Malacca.**

The US will use naval carriers to blockade the Strait of Malacca, cutting off what Jiang estimates at 80 to 90 percent of China's energy and trade.[5] China recognizes the Strait as existential. This creates direct US-China confrontation at the chokepoint, not a side-effect of some other conflict but a deliberate pressure point baked into published American strategy.

Jiang cites the US National Defense Strategy as a publicly available document that explicitly programs the chokepoint campaign: secure the Western Hemisphere, reimagine ally relationships, economically strangle China via chokepoints, reinvigorate US defense manufacturing.[6] He reads the US military cooperation agreement with Indonesia as legal groundwork for what is to come.[7] The Malacca confrontation, in this reading, is not improvisation. It is policy.

**Flashpoint Three: North Korea Extorts Seoul.**

This is the one Jiang calls "most surprising but actually the most pressing."[8] It is also the one with the most direct game-theory architecture behind it.

The US has moved its THAAD missile-defense system from South Korea to the Middle East for the Iran war, stripping Seoul's air-defense shield.[9] North Korea has 10,000 troops fighting in Ukraine, demonstrating military willingness under conditions that would break other armies.[10] Russia signed a mutual defense pact with Kim Jong-un in June 2024, meaning any US retaliation against North Korea risks triggering Russian obligation to respond.[11] The window, from North Korea's perspective, does not get better than this.

Jiang walks through Kim Jong-un's position with the flat logic of a game-theory exercise. North Korea is poor, GDP per capita around $771 against South Korea's approximately $33,000.[12] Its soldiers fight to the death; South Korea's population, rich and comfortable and demographically shrinking at a fertility rate of 0.81 against the North's 1.81, will calculate very differently.[13] North Korea has somewhere between 10,000 and 15,000 artillery emplacements within range of Seoul. It does not need to destroy South Korea. It needs to threaten it credibly, collect payment, and repeat. Extortion, not annihilation.

The preferred outcome, Jiang argues, is not bombardment but the credible threat of bombardment. "All North Korea has to do is tell the Koreans, 'You either pay us a lot of money or we'll go attack you.' Right? It's that simple."[14]

In June 2026, Jiang adds a second-order frame: Xi Jinping's visit to Pyongyang, the first since 2019, is not merely diplomatic housekeeping. It is Beijing using North Korea as its regional "pitbull" against Japan's remilitarization, in the same way Washington uses Israel in the Middle East.[15] This shifts the causal driver from Kim's independent game-theory calculation to Xi's strategic instruction. The two framings are not logically incompatible, since Kim can pursue both his own interests and China's simultaneously, but the shift between May and June 2026 is unannounced and worth noting.

# Zeihan's Rival Lens

So. Here is where Zeihan lands.

Zeihan disagrees with the simultaneity thesis, disaggregates the three theaters, and in the process provides some of the most interesting structural analysis of all three flashpoints taken independently.

**On Taiwan**, Zeihan's position is unchanged from 2022 to 2026: a Chinese military move is national suicide dressed as geopolitics. China imports roughly 80 percent of its energy; approximately 75 percent comes from the Persian Gulf, virtually all of it through the Indian Ocean and the Strait of Malacca.[16] An attack on Taiwan would allow the US and its partners to interdict those flows without firing a shot at the invasion fleet. Zeihan's language, from December 2025, is precise: an attack on Taiwan is "the end of China as an entity" and "the end of the Han ethnicity because of energy shortages and famine."[17]

In May 2026, asked directly whether China should exploit the window created by the Iran War, Zeihan said: tactically, the US is “out of position” and preferred weapons “aren’t available in the numbers they would need to be.” Strategically, catastrophe. “The United States would shut off energy flows to China and within a year China would fall into a post-apocalyptic wasteland complete with famine that kills half of their population.”[18] The only exception is if Washington decides Taiwan is not worth defending. Zeihan does not rule this out, given current US political behavior, but he treats it as strategically idiotic.

As of May 2026, truck-mounted anti-ship missiles, the Typhon and Japanese Type-88, were deployed throughout the Philippines.[19] Japan’s weapons export liberalization, passed the same month, means the island chain is now being actively fortified rather than notionally defended.[20] The US submarine basing arrangement at HMAS Stirling near Perth, announced February 2026, is designed to interdict Chinese Indian Ocean shipping routes up to and including Malacca in the event of a hot war.[21]

**On Malacca**, Zeihan inverts Jiang’s framing almost completely. The Strait is not a site of Chinese power projection but China’s primary structural vulnerability, controlled by Malaysia, Singapore, and Indonesia, none of whom has aggressive intent toward each other or toward the US. Malacca closes as a consequence of a wider East Asian war, not as a trigger. The actor with the power to close it is the US and Japan, not China. In his October 2025 global trade-routes assessment, Zeihan describes the Southeast Asian route as probably stable except under the condition that “things go really horribly bad” externally.[22]

**On North Korea**, Zeihan’s position has evolved the most dramatically. The 2014 book treated North Korea as marginal and largely controlled. By June 2026, Zeihan says North Korea is no longer a Chinese puppet. Kim Jong-un has formally renounced reunification, aligned militarily with Russia in exchange for ICBM technology, and is now playing Beijing and Moscow against each other for leverage. North Korea “probably could nuke the United States,” courtesy of Russian technology.[23] Xi’s visit to Pyongyang was, in Zeihan’s reading, an attempt to re-leash an actor that is no longer leashable, and Xi “was not having a good time of it.”

On the Seoul artillery threat, Zeihan is blunt and largely aligned with Jiang on the raw fact: 10,000 to 15,000 artillery emplacements within range of Seoul, and “there simply is no conventional or even nuclear solution to that.”[24] South Korea’s drone program is the only current answer, and as of July 2026 whether it works is an open question.

The US-South Korea nuclear submarine deal from December 2025 is Zeihan’s signal that Seoul’s nuclear hedging is already underway.[25] Once one of Japan, Taiwan, or South Korea acquires nuclear-armed submarines, the others follow. This is not a security arrangement. This is the beginning of a Northeast Asian nuclear arms race.

**The simultaneity rejection** is Zeihan’s clearest disagreement with Jiang. He does not construct a scenario in which all three theaters erupt together. China faces structural deterrence through energy dependency; North Korea acts for autonomous regime leverage, not as a Chinese proxy coordinated with Taiwan moves; Malacca disruption would be a US and Japanese action against China, not an initiating stroke by any adversary. The causal arrows run differently in each theater.

Where Zeihan’s June 2026 analysis that North Korea is no longer a Chinese puppet becomes particularly important: if Kim and Xi are not in strategic alignment, the coordination that Jiang’s simultaneous eruption requires becomes structurally harder to arrange.

# The Wider Field

The research literature, as of July 2026, largely treats the three flashpoints as probabilistically linked through shared enabling conditions, without endorsing simultaneous eruption as a base-case forecast.

**On Taiwan**, the Council on Foreign Relations rates a severe Taiwan Strait crisis as Tier I priority for 2026: moderate likelihood, high impact, the “most dangerous flashpoint in the world today.”[26] But CFR and ASPI both distinguish between a gray-zone crisis and an amphibious invasion. ASPI’s Joe Keary (January 2026) concludes that “a Chinese attempt at blockading or invading Taiwan in 2026 is unlikely,” citing PLA leadership purges, US arms transfers, coalition-building by Japan and the Philippines, Taiwan’s $40 billion defense plan, and China’s economic fragility.[27] The International Centre for Defence and Security, from a European base, goes further:

China is “losing its ability as well as a sense of immediacy to attack Taiwan,” noting the CMC has been reduced to two members with no operational military experience as of January 2026.[28]

Prediction markets, as of July 2026, price the probability of China invading Taiwan by end of 2026 at 4 percent on Polymarket, with $38.6 million in trading volume.[29] Metaculus puts it at 10 percent across 830 forecasters.[30] The International Crisis Group gives a Taiwan Strait crisis, defined broadly to include gray-zone escalation and miscalculation, a roughly 50 percent probability in 2026, but this is crisis, not invasion.[31] The 2027 window remains the most-cited benchmark for when Chinese military capability reaches its intended readiness point.

**On Malacca**, CSIS in July 2026 calculates that the Strait handles $2.4 trillion in annual goods, 21 percent of global maritime trade.[32] The Diplomat’s analysis from May 2026 establishes that China imports over 11 million barrels of oil per day, roughly four-fifths transiting Malacca, and that overland Belt and Road alternatives cannot substitute at commercial scale.[33] S&P Global in April 2026 documents piracy at the Strait surging 74 percent to 108 incidents, with 102,500 vessel transits in 2025.[34]

The analyst consensus, however, treats Malacca disruption as a collateral casualty of a Taiwan conflict rather than an independent flashpoint. No major institution forecasts a state deliberately closing Malacca as an initiating act. The risk in 2026 is congestion and piracy spillover from Hormuz, not strategic interdiction.

**On North Korea and Seoul**, NPR reported in May 2026 that North Korea announced deployment of new 155mm self-propelled gun-howitzers with a range exceeding 60 kilometers, sufficient to strike central Seoul, with Kim Jong-un personally inspecting the weapons.[35] The TNSR analysis by Anderson and Press challenges conventional estimates of bombardment lethality, using 10,000-run Monte Carlo simulations to produce realistic fatality estimates of approximately 2,600 to 2,961 civilians, roughly 1 to 3 percent of commonly cited figures, owing to urban shelter availability and counter-battery response speed.[36] Their finding cuts the other direction as well: if North Korea’s conventional attack fails quickly, nuclear escalation becomes more likely.

Korea Times reporting in June 2026 identifies a first-mover dilemma created by South Korea's fixed-site ballistic missile deployments: both sides face preemption incentives in a crisis, which could make bombardment more likely even without an opportunistic intent on North Korea's part.[37]

**On simultaneous eruption**, this is where the consensus thins most sharply. CFR's December 2025 report identifies simultaneous crises as an underappreciated risk, noting that "most wargame simulations fail to model simultaneous contingencies" and calling this a "critical analytical gap."[38] Andrew Michta at 19FortyFive in July 2026 makes the sharpest argument: "sequential conflicts are manageable; simultaneous ones are catastrophic," and he identifies 20 to 40 percent redeployment of US forces from the Korean theater to a Taiwan contingency as creating "a window North Korea is likely to exploit."[39] The 38 North analysis from April 2026 accepts as a planning baseline that Pyongyang might perceive a strategic opportunity during reduced US presence, and models South Korea as capable of weeks of independent defense but not a self-sufficient victory over sustained operations.[40]

Nick Bisley at the Toda Peace Institute in June 2026 identifies the three flashpoints as structural vulnerabilities converging under the condition of declining American primacy in East Asia, and a region with "no credible crisis management mechanisms."[41] The global trend lines, from Global Taiwan Institute's analysis, show North Korea has historically exploited windows of great-power distraction: NPT withdrawal during the 2003 Iraq War, missile launches during the Russia-Ukraine conflict peak.[42]

# Assessment

What follows is opinion, not source.

The calibration question on Zeihan is specific to his China thesis. He has been forecasting Chinese demographic implosion and economic crisis since 2014, across three successive books, and his timing has slipped in each iteration. The structural case remains coherent and directionally supported by the data. But the timing slippage matters here: a framework that has been right about the direction and wrong about the schedule three times running carries a known exposure when its strong counter-thesis confronts Jiang's simultaneity claim.

The Three Flashpoints case is the strongest prediction in Jiang's East Asia analysis, but for a reason he does not emphasize enough. The strength is not in any single flashpoint. It is in the simultaneity argument.

Zeihan and the research consensus generally accept the raw ingredients: North Korea has an unresolved artillery threat against Seoul that currently lacks a conventional or nuclear answer; the Malacca Strait is China's structural chokepoint and a permanent strategic vulnerability; Taiwan is the recognized top-priority flashpoint in the professional literature. The disagreement is about coordination and timing.

Here the simultaneity claim turns out to be analytically stronger than it looks. Jiang does not need three coordinated adversaries running a joint campaign. He needs one shared enabling condition, and that condition, American military overstretch in the Middle East combined with weapons redeployment from Asia, is documented and real. THAAD left South Korea. The US fleet is tied up near Iran. Munitions stocks are depleted. Under these conditions, opportunistic North Korean pressure on Seoul is not a conspiracy but a game-theory inevitability, which is exactly what Michta argues and what the 38 North dual-contingency modeling accepts.

The weakest flashpoint, analytically, is Taiwan as a near-term military event. The prediction markets' 4 percent and 10 percent estimates reflect the structural deterrence Zeihan describes, and the CMC disarray documented by ICDS is not an argument for Chinese military adventurism. Jiang himself walked this back in July 2026. If the Taiwan flashpoint is Japan-China confrontation over soft Chinese coercion rather than a PLA invasion, the scenario is more credible but also less dramatic than the original framing suggests.

The Malacca flashpoint presents the deepest divergence between Jiang and the consensus. Jiang frames it as a US blockade of China, which places the US in the aggressor role at the chokepoint. The consensus, including Zeihan, frames it as a Chinese vulnerability to US interdiction in the event of a broader hot war. These are not as different as they appear: in both cases the Strait becomes a site of US-China confrontation. The disagreement is about whether Malacca is the trigger or the setting.

On North Korea, Jiang and Zeihan are closer than either's framing suggests. Both agree the artillery threat is real and currently unresolved. Both agree North Korea is increasingly autonomous and dangerous. The dispute is about whether Kim acts as a Chinese proxy coordinating with a Taiwan move, or as an independent rational actor pursuing his own leverage. Zeihan's June 2026 analysis, that Kim is no longer a Chinese puppet and Xi could not control him, actually makes North Korean opportunism more likely than Jiang's original framing, not less, since an autonomous Kim calculating his own interests faces exactly the window Jiang describes without needing Xi's permission.

The informed balance is this: simultaneous full eruption across all three theaters, Taiwan invasion plus Malacca blockade plus Seoul bombardment, remains a low-probability near-term event, consistent with the prediction markets. But the simultaneous eruption of lower-level conflict across all three, gray-zone Taiwan crisis plus maritime congestion plus North Korean coercive demands under threat of artillery, is not a fringe scenario. It is what the CFR, Michta, Bisley, and 38 North are warning about when they flag the dual-contingency planning gap. The three flashpoints are structurally linked by the same enabling condition. That link is the real analytical contribution of Jiang's prediction, and it is more durable than any of its individual components.

The evidence is moderate, the confidence moderate. The simultaneity thesis loses its enabling condition if THAAD returns to South Korea, the US fleet redeploys to the Pacific, and North Korea makes no coercive move against Seoul within twelve months of the Iran war's end.

# CHAPTER 13: THE AI SURVEILLANCE STATE

While the flashpoints in the previous chapter are about who controls the territory, this one is about what the territory is eventually for.

The Programmable Cage is what Jiang Xueqin names it. His prediction here is not a prediction about a war or a treaty or a piece of territory. It is a prediction about what every war and treaty and seized territory is ultimately for. The endpoint, in his telling, is a universal AI surveillance state built on two structural pillars: mandatory digital ID that tracks everything you do, and programmable digital currency that controls everything you spend. Together, in his formulation, they make the cage. And China has already built the prototype.

That is the claim. What follows is the reasoning behind it, the silence where a rival analysis should be, and what the available evidence actually shows.

## Jiang's Prediction

Jiang states his AI surveillance case as the most consequential single forecast he offers. "The world will move towards an AI surveillance state," he told his audience on May 7, 2026. He treats the direction as settled; the only open variable is timing.[1]

The mechanism is simple in structure, if not in implication. Every person gets enrolled in a national database via digital ID. Every financial transaction runs on programmable digital currency. Between the two, governments can monitor behavior comprehensively and reward or punish it financially. Jiang describes the Chinese system from the inside: "In China, we all have digital ID. If you want to access anything in China, you need your digital ID… everyone's part of this national database."[2] He lives there. He is not theorizing from a distance.

So. The China model is Jiang's proof of concept. The West, he says, will replicate it. Britain, Canada, the United States: "I assume it will pass everywhere in the western world."[3]

Step one: AI, specifically the large language model variety, has no viable commercial business model on its own. "AI by itself can't make any money," he asserts.[4] Step two follows immediately: therefore the only rational explanation for the trillions being invested in data centers is state surveillance. “Why is all this money being spent except one day to create a surveillance state? That’s what makes sense.”[5]

Step three gets more interesting. Twenty-first-century warfare, Jiang argues, is population management. Enemies probe for internal unrest; states respond with monitoring and control. The AI surveillance state is the logical domestic-policy complement to geopolitical conflict.[6] Step four: the China system is technically mature and therefore not speculative for Western planners, just politically unavailable at home. Which leads to step five: China is simultaneously a testing laboratory for surveillance technology that the US cannot legally deploy on its own citizens.

The argument escalates from there. Trump’s Stargate program, the $500 billion data-center investment, is read as the infrastructure layer for domestic surveillance, not commercial AI deployment.[7] A Trump third term becomes a structural requirement: “You need an AI surveillance state… because this plan can only work if the Americans don’t rise up and revolt like they did in the Vietnam War.”[8]

By the final steps, the argument has entered territory Jiang himself flags as speculative. The end-state is labeled “techno-Marxism”: an AI god, controlled by a small elite, replaces money as the governing system of human attention and behavior.[9] The physical terminus is microchip implants that function as digital ID and digital currency inside the body, a “mark of the beast” that eventually issues behavioral instructions the recipient experiences as divine guidance.[10] A one-world government based in Jerusalem, which he calls Pax Judaica, enforces the whole apparatus.[11]

There are internal contradictions worth noting. In some episodes Jiang presents the surveillance state as an intentional long-planned elite project. In others, when asked directly, he dissents: “I don’t think it’s engineered. I think they are responding and reacting to real time crisis.”[12] He does not reconcile these positions. Similarly, China is simultaneously framed as the US surveillance partner, supplying human subjects for experiments, and as a target of US economic strangulation intended to provoke regime collapse. He offers both framings without acknowledging the tension.[13]

The load-bearing core of the argument, stripped of the eschatological superstructure, is this: digital ID and digital currency are converging globally; the Chinese model shows the behavioral-control endpoint; and Western governments will not resist the same convergence because the geopolitical pressure to control populations is universal. That core is separable from the Pax Judaica elaboration and more testable. The sourced material below addresses it specifically.

# Zeihan's Rival Lens

Peter Zeihan does not address this claim.

Neither his books nor his 2026 video output discusses mandatory digital-ID systems, central-bank digital currencies, an AI-driven surveillance state as a governing model, or the export of Chinese surveillance infrastructure to Western democracies. A search of all 81 dated video files from April through July 2026 and both books for every relevant term (surveillance, social credit, digital ID, programmable currency, CBDC, biometric, facial recognition, authoritarian export, Chinese model) returned zero matches in the 2026 video record.[14]

The single proximate passage in the books is a descriptive aside from the 2022 agriculture chapter. Discussing facial recognition as a precision-farming tool, Zeihan notes that in democracies the technology unlocks phones, while "in China, the most common use is for the government to know where you are, who you are with, and what you're doing at any given second."[15] That is a descriptive contrast offered to introduce an agricultural application. It carries no inference about export, Western adoption, or governance trajectory.

Zeihan's China thesis runs structurally against the Jiang scenario without ever addressing it directly. A China in demographic implosion, financial overextension, and supply-chain collapse cannot project governance models abroad. He discusses China's failing sand-island military strategy in April 2026 and Beijing's loss of leverage over North Korea in June 2026, both consistent with a declining-China picture.[16] His view of Western democracies is similarly adverse to the Jiang endpoint: the United States is deglobalizing into relative self-sufficiency and pulling back from international entanglement, not importing foreign governance architectures.

Confirmed silence is a finding, not a gap. Zeihan simply does not engage with this prediction. His structural framework is not compatible with it, but he never develops the counter-argument, so there is no counter-argument to analyze.

# The Wider Field

The research literature on AI surveillance, digital currencies, and Chinese technology exports is, by this point, substantial. Three things emerge from it that bear directly on Jiang's claim.

First, the infrastructure enabling his scenario is real and expanding. The Carnegie Endowment's Steve Feldstein documented, as of his 2019 index, that Chinese company technology supplies AI surveillance in at least 63 countries, with Huawei alone present in approximately 50 nations.[17] Strikingly, Carnegie found that 51% of advanced democracies deploy AI surveillance systems, compared to 37% of closed autocracies, which led Feldstein to conclude that regime type is a poor predictor of surveillance adoption. The spread is not limited to authoritarian customers.

Economists Martin Beraja, Andrew Kao, David Y. Yang, and Noam Yuchtman published peer-reviewed research in January 2023 finding that China has a "comparative advantage in facial recognition AI" and is "substantially more likely to export facial recognition AI than other countries." Their key finding: autocracies and weak democracies are more likely to import Chinese facial recognition AI, particularly those lacking domestic AI investment or experiencing political unrest. And countries that imported Chinese facial recognition AI subsequently experienced democratic backsliding. Theirs is the only technology category in the study showing this autocratic export bias.[18]

Freedom House documented in its 2025 internet freedom report that a Chinese company had exported Great Firewall technology to facilitate government censorship in Myanmar.[19] The National Endowment for Democracy, in a report by Valentin Weber, identified four tracks of Chinese data-centric authoritarianism with export dimensions: AI surveillance, neurotechnology, quantum computing, and digital currencies, arguing that China "actively exports these repression tools" through direct government sales, consumer apps, and subsidized pricing.[20]

On digital currency, the numbers are not trivial. The People's Bank of China reported 180 million e-CNY wallets and $7.3 trillion in cumulative transaction volume as of end-2025.[21] Lawfare analysts Yaya Fanusie and Emily Jin, writing in April 2025, found that the e-CNY architecture "enables smart contracts and enhanced tracking" of financial activity, creating what they call "a more intelligible and controllable economy."[22] The IMF's Fintech Note 2024/004, published August 2024, acknowledged that CBDC "may allow for a 'digital trail'" that creates the potential for population-level financial surveillance, while advocating privacy-by-design approaches as a corrective.[23] Nottingham Trent University research from May 2025 found that more authoritarian governments lead CBDC adoption because centralized power structures allow rapid implementation of "tightly controlled systems," while democracies proceed more cautiously due to privacy and trust concerns.[24]

So much for the infrastructure. The second thing the research shows is that the West has also built meaningful institutional resistance. In July 2025, the US House passed the Anti-CBDC Surveillance State Act (H.R. 1919) by 219 to 217, with the stated rationale of preventing "a CCP-style surveillance system where the government can monitor or deplatform individual spending."[25] The GENIUS Act, signed July 18, 2025, explicitly prohibits the Federal Reserve from issuing a retail CBDC.[26] Canada formally rejected a mandatory national digital ID as of January 2026, with the federal government stating there are no plans for such a system; law professor Michael Geist noted this followed sustained pressure from the privacy commissioner and public concern about "normalizing digital surveillance."[27]

The EU is more complicated. Regulation (EU) 2024/1183, known as eIDAS 2.0, requires every member state to make a digital identity wallet available to citizens, residents, and businesses by end-2026.[28] The mandate is framed as empowering users, but the European Digital Rights coalition warned in March 2026 that the Commission's implementing acts were "weakening the wallet safeguards meant to prevent surveillance," introducing mandatory biometric processing not in the original regulation, and narrowing pseudonym protections.[29] On the digital euro, EDRi and epicenter.works sent an open letter to the EU Parliament and Council on June 17, 2026, arguing that "privacy guarantees rely too heavily on institutional assurances rather than technical enforcement."[30] The EU AI Act's Article 5, enforceable from February 2, 2025, prohibits AI systems that classify individuals based on social behavior resulting in disproportionate treatment, though the Future of Privacy Forum noted that all three statutory conditions must hold simultaneously, leaving meaningful carve-outs for credit scoring, fraud detection, and targeted advertising.[31]

Third, the consensus on outcome is genuinely split. Analysts divide into three camps. Camp A, represented by Beraja et al., the NED's Weber, and the Lawfare analysts, argues that the combination of Chinese exports, Western government appetite for surveillance, and weak enforcement of privacy safeguards is producing convergence toward algorithmically managed populations, even if Western systems are softer and more fragmented. Camp B, associated with Sheena Chestnut Greitens at Brookings and the Future of Privacy Forum, argues that demand for surveillance technology is driven by local practical needs rather than ideological emulation, that Western legal institutions represent genuine structural barriers, and that the Chinese model is not transplantable because it depends on single-party power to operate.[32] Camp C, where Carnegie's Feldstein, Freedom House, and the IMF sit, documents the spread of surveillance infrastructure into democracies without predicting the same behavioral-control outcomes, emphasizing that lawful and unlawful deployment are different things even if the hardware is identical.[33]

UK Finance observed in 2025 that most major Western democracies are moving toward wholesale rather than retail CBDC, focused on interbank settlement rather than individual-level spending tracking. If that trajectory holds, the behavioral-control mechanism Jiang describes would not be implemented even as the infrastructure expands.[34]

# Assessment

The model's turn again.

Zeihan's silence on this prediction is total. That silence cannot function as calibration: the absence of a counter-argument is not the same as a refutation. His structural framework treats Western democracies as deglobalizing inward, which resists the Chinese-export-of-governance trajectory Jiang describes. But Zeihan has also consistently underestimated the speed at which technology built for authoritarianism migrates into democratic contexts. His dismissal of Chinese surveillance export effects is a product of a framework that generally underweights non-economic transmission mechanisms.

Jiang’s prediction divides cleanly into three layers, each with a different standing against the evidence.

The first layer is the documented reality: Chinese surveillance technology has spread to 63 or more countries, the e-CNY carries programmable-surveillance capability by design, eIDAS 2.0 mandates digital identity infrastructure across the EU by end-2026, and authoritarian governments are adopting digital currencies faster and with fewer constraints than democracies. On this layer, Jiang is not ahead of the evidence; he is citing a direction that mainstream institutions from the IMF to the Carnegie Endowment confirm exists.

The second layer is the trajectory claim: that Western democracies are following China’s governance model, not merely adopting similar hardware for different reasons. Here the evidence is genuinely contested. The Beraja-Yang research found that importing Chinese facial recognition AI is uniquely associated with subsequent democratic backsliding, which is the strongest quantitative support available for Jiang’s direction of travel. Against it sits the Greitens demand-side analysis, the US legislative record (H.R. 1919, the GENIUS Act), Canada’s January 2026 rejection of mandatory digital ID, and the EU AI Act’s Article 5 prohibitions. These are not decorative institutions. They represent documented policy choices by democratic governments explicitly resisting the endpoint Jiang describes. The gap between infrastructure and control endpoint remains large.

The third layer is Jiang’s specific claim about coordination: that Britain, Canada, China, and the United States are cooperating rather than competing on surveillance rollout, that intelligence agencies are “friends” manufacturing threats to extract domestic budgets, and that the whole apparatus serves an eschatological elite project culminating in a one-world government in Jerusalem. This layer has no corroboration in any sourced material. The Pax Judaica superstructure, the microchip-as-voice-of-God terminus, the China-as-US-laboratory arrangement: none of these are documented claims. Jiang says so himself, repeatedly. “I could just be making all this up.”

The honest read is that Jiang has identified a real structural tendency, extrapolated it to a contested destination, and then projected a speculative eschatological framework onto it as explanation. The tendency is real; the destination is contested; the explanation is unsourced. Separating these three layers is the work. The Programmable Cage is being assembled in pieces, by different actors with different motivations, in different jurisdictions, at different rates. Whether those pieces converge into one deliberate control architecture or remain fragmented tools deployed for local purposes is the open question the evidence does not yet answer.

What Jiang gets right is that the risk runs in one direction. The technologies are not neutral. Once a government has 180 million CBDC wallets, a national facial recognition database, and mandatory digital identity infrastructure, the capability to implement behavioral control exists regardless of current intent. The IMF warns of the digital trail; the EU civil-society coalition warns the wallets could become surveillance tools; the US Congress voted to prohibit a retail CBDC precisely because it saw the risk. The institutional resistance is real, but it is downstream of infrastructure that is already being built.

That is not the same as confirming Jiang’s prediction. A world in which democracies build surveillance-capable infrastructure that they legally constrain from its worst uses is not the world Jiang describes. But it is not a world that can ignore the direction he is pointing, either. What an empire in terminal overstretch builds to manage domestic dissent as its material resources decline is, precisely, what Chapter 14 examines next.

Contested evidence, moderate confidence. Two developments would resolve it in opposite directions: a major Western democracy deploying a retail CBDC linked to mandatory digital ID with programmable spending restrictions would confirm the behavioral-control convergence Jiang predicts. All major CBDC programs shifting permanently to wholesale-only architecture with no individual-level tracking would close the mechanism his prediction requires.

# CHAPTER 14: COLLAPSE OF THE AMERICAN EMPIRE

Every empire believes it is the exception. Rome believed it. Athens believed it. Britain, standing astride a quarter of the world's surface in 1900, believed it so thoroughly that the idea of decline felt like a category error. Then Suez happened, and within a decade the empire was furniture.

This chapter does two things at once. It assesses Jiang's final prediction, the collapse of American empire. And it does what the closing chapter of this book is obliged to do: step back from every individual prediction and ask whether either lens, Jiang's intentional-engineered collapse or Zeihan's structural unraveling, has actually told us something useful about the world that arrived in 2026.

Jiang Xueqin's terminal prediction is simple: the United States joins that list within five to ten years. The debt is unpayable, the war in Iran is unwinnable, the entire financial architecture rests on military credibility that the quagmire is busy destroying. What comes out the other side is famine, mass migration, and a Bronze Age ending. This is the closing argument of Predictive History as Jiang practices it, and it is the sharpest claim he makes in the entire corpus.

Zeihan's answer is equally simple, and points in exactly the opposite direction. The world collapses. The United States comes through it better than anyone else. Not despite the carnage, he writes in *The End of the World is Just the Beginning* (2022), but in many cases because of it.

Two lenses, one landscape, opposite verdicts. This chapter lays out both. The fertilizer mechanism gets its own passage, because it is the one place in this entire book where the two men are looking at the same thing and seeing the same catastrophe, just aimed at different people.

## Jiang's Prediction

The case Jiang makes for American collapse is not really about one thing. It is a chain, and each link pulls the next.

Start with the debt. The US national debt stands at $37 trillion.[1] Jiang treats this not as a problem to be managed but as a structural confession: the government has been financing consumption with borrowing for decades, and the bill is coming. The mechanism he borrows from Thomas Piketty's *Capital in the Twenty-First Century* is the divergence between the real economy, growing at roughly 2 percent a year, and the financial economy, growing at roughly 5 percent.[2] The stock market is now worth twice the underlying economy. Jiang calls this, without apology, "a make-believe economy."

But the debt alone does not collapse an empire. What collapses an empire is the moment other people stop believing you can pay. For Jiang, the mechanism that sustains belief is military power, and the mechanism that sustains military power in the modern era is the petrodollar: oil priced in dollars, surpluses recycled into Treasuries, demand for Treasuries keeping interest rates low enough that the debt stays serviceable. Pull that thread, the whole garment comes apart. This is why Jiang has been arguing since 2024 that America was structurally compelled to attack Iran.[3]

The war, on Jiang's reading, is not a choice. It is a symptom. Iran controls the Strait of Hormuz, which carries roughly 20 percent of globally traded oil. More importantly, the Gulf states that sell oil in dollars depend on American military protection. If that protection looks hollow, the arrangement collapses. Putin's Ukraine invasion cracked the aura of American invulnerability. To restore it, the US military needed a visible, decisive victory. Iran was the chosen demonstration. The problem, as Jiang has argued through the entire Game Theory series, is that Iran cannot be decisively beaten. The terrain makes bombing ineffective. A ground invasion traps American forces for years. The Vietnam reference is not decorative; it is the prediction. Domestic revolt, economic cost, forced retreat, and at the end of that sequence, a broken dollar and a finished empire.[4]

Peter Turchin's "elite overproduction" framework runs underneath all of this.[5] Jiang is not predicting a workers' revolution. He is predicting that too many people have trained for elite positions, too few positions exist, and the resulting factional warfare inside the American ruling class is what splits and eventually breaks the institutions. Trump versus the permanent establishment, in Jiang's reading, is not a personality conflict. It is the symptom of a system that has run out of room for everyone who expects a seat.

The historical analogy that Jiang returns to across multiple lectures is the Peloponnesian War. Athens equals America. The Delian League equals NATO. The treasury drained to fund imperial overstretch equals the petrodollar system. The Sicilian Expedition equals the Iran invasion: a bold strike into hostile terrain that was supposed to restore confidence and instead revealed the limits of Athenian power. Thucydides' line from the Melian Dialogue, the strong do what they can, the weak suffer what they must, is not a motto Jiang endorses. It is a description of the moral arc of empires declining. As they weaken, they talk less about justice and more about power.[6]

The Bronze Age Endgame is the template Jiang invokes for what comes next. Eric Cline's *1177 BC* documents how a globalized, prosperous, deeply interconnected Bronze Age world collapsed within fifty years: climate disruption, failed harvests, migration, internal revolt, and piracy in a combination that no individual civilization could absorb because none had built in redundancy.[7] Jiang's version adds his own analytical layer: the Bronze Age grew because of capital, and collapsed because of capital. The logic of concentrated wealth drives rapid integration and then inevitable implosion when the integration produces enough inequality and enough debt that the system cannot recycle its own surpluses. Today's world mirrors the Bronze Age not as metaphor but as mechanism, on his account. The globalization is more extensive; so is the fragility.

Jiang dates the terminal sequence sharply in a May 2026 Q&A: "I think American empire will collapse in the next 5 to 10 years because it is overstretched, it's in too much debt, and it is really angering the entire world."[8] The multipolar world that follows, he predicts, will itself last perhaps ten to twenty years before some new ordering principle asserts itself. That, too, will not be a peaceful transition.

# Zeihan's Rival Lens

Right. Now the other map.

Peter Zeihan's foundational thesis is that the collapse Jiang describes is real. Just not for America.

*The End of the World is Just the Beginning* (2022) states it plainly in the introduction: “not only despite the global churn and degradation, but also in many cases because of it, the United States will largely escape the carnage to come.”[9] Zeihan means this structurally. The US has the world’s most extensive navigable inland waterway system for cheap internal transport. It has the world’s largest block of high-quality temperate-zone arable farmland. It has the shale energy complex that eliminated import dependency. Its demographics, battered, but far better than the European, Chinese, Japanese, and South Korean alternatives, mean it retains a productive labor cohort where others have none. In a capital-constrained world after globalization, these are not marginal advantages. They are decisive.

On the debt, Zeihan does not dismiss the problem. He describes the bipartisan fiscal expansion from Bush through Biden as generating a trajectory that is genuinely unsustainable. But his framing is categorically different from Jiang’s. The US T-bill is, at $36 trillion, not just the best available debt instrument, it is the market itself, the baseline around which all other financial instruments trade.[10] When capital flees other systems, it comes to the US, not away from it. The Federal Reserve, unlike the European Central Bank, the Bank of Japan, or the People’s Bank of China, has not yet deployed quantitative easing at anything like its capacity. There is room. And in a world where the alternatives are European demographic death, Chinese debt at roughly 300 percent of GDP, and Japan approaching 500 percent including pension obligations, the US at roughly 124 percent of GDP is the cleanest dirty shirt, as the old formulation goes.

Zeihan’s timeline for US debt stress is the 2030s and 2040s, when Baby Boomer retirement fully converts the largest cohort of taxpayers into the largest cohort of tax consumers. Not five to ten years.[11]

The corruption indictment Jiang raises is something Zeihan actually endorses in substance. He describes the $1.8 billion DOJ settlement under Trump as a slush fund comparable to Venezuelan or Nigerian corruption practices, the single largest step backward in American rule of law in the second Trump term, in his assessment.[12] He characterizes the staffing model of selecting for personal loyalty over competence as inflicting incalculable damage on the FBI’s counterterrorism capacity, the Defense Department’s promotion system, and the federal regulatory apparatus. He uses the phrase "failed presidency." But his frame is damage inside a durable system, not terminal collapse. The republic has survived six previous political realignments, he argues, and geography and demographics are what separate the US from places where similar corruption produces state failure.

On American strategic power, Zeihan's 2026 language is sharper than his books anticipated. In April 2026, he described the moment as "the beginning of the greatest collapse in strategic power that I have seen in my life," comparing the scope to the Soviet collapse at the end of the Cold War.[13] He means the end of the US as global security guarantor, the dissolution of the postwar alliance structure, and America's contraction to a Western Hemisphere regional power by choice and design, or by Trump's particular version of inattention. That is a significant claim. But it is not Jiang's claim. Zeihan's US loses its global military footprint. It does not lose its ability to function as a state, an economy, or a dominant force in its own hemisphere.

The Bronze Age Collapse appears in Zeihan's own work, but pointed differently. He uses it in the climate change chapter of the 2022 book to illustrate what happens when multiple moisture systems fail simultaneously. His conclusion is that North America, with two independent moisture systems, is the most insulated zone on the planet from this kind of collapse, while monsoonal-only zones like India, Brazil, and Southeast Asia suffer most.[14] He does not apply the Bronze Age Collapse analogy to the United States. He applies it to everywhere else.

# The Wider Field

The outside forecasters on American decline do not converge on Jiang's timeline or his framing of the mechanism, but they are not cheerful either.

Ray Dalio is the most prominent mainstream voice approaching Jiang's urgency. Writing in *Fortune* in June 2026, Dalio described the US as past the point of no return on its debt trajectory and invoked the Suez analogy directly: Britain won the military engagement at Suez in 1956 and lost the empire anyway, because the US threatened to withhold IMF support as the pound faced speculative attack, and the financial pressure broke the will to hold the position.[15] Dalio's operative phrase, "watch out for allies and creditors losing confidence," is a warning about what the

2026 Hormuz crisis could set in motion over time. By March 2026, all three major rating agencies had downgraded US credit, and the dollar's share of global reserves had fallen to 56.9 percent, the lowest since 1995.[16] The CBO projects interest costs at $1 trillion in 2026, rising to $2.1 trillion by 2036, against a base of $5 trillion in revenue.[17]

Alfred McCoy draws the imperial-decline case most explicitly. In his reading, the US-Iran war exemplifies what he calls "micro-militarism": declining empires launch bold military strikes that expose rather than restore their power. He places the Iranian Hormuz closure in a sequence with the Sicilian Expedition (413 BC), Portugal's Morocco crusade (1578), Britain's Suez adventure (1956).[18] His timeline is "by 2030" for the end of American imperial capacity. Not five years. Not ten. But close enough that the difference is less a disagreement than a rounding dispute.

Peter Turchin predicted in a 2010 *Nature* article that US political instability would peak around 2020. By his own assessment after the 2020 uprisings and January 6 Capitol attack, the forecast was "disastrously correct." His 2023 book *End Times* argues the breakdown is just beginning, driven by elite overproduction, the same framework Jiang uses, popular immiseration, and declining state fiscal capacity.[19]

The IMF's 2026 Article IV Consultation stated plainly that "the window for orderly adjustment is narrowing."[20]

On the other side, Patel et al., publishing in *Frontiers in Political Science* in 2025, used quantitative modeling of historical hegemonic cycles to place American primacy turning points "between 2032 and 2067," conditional on policy decisions rather than structurally predetermined.[21] Michael Beckley remains the most systematic dissenter, arguing in *Unrivaled* (2018) and subsequent writing that US structural advantages, resources, demographics relative to rivals, institutions, secure geography, have been consistently underweighted by declinists, and that the US has defeated similar predictions across the postwar era.[22] Nouriel Roubini, writing before the February 2026 Hormuz closure, called his modal scenario "a short, shallow downturn followed by a strong recovery" and concluded that "US economic exceptionalism is not over."[23]

Johan Galtung's 2025 deadline for US imperial collapse has come and gone without the terminal event he predicted. A January 2026 *Journal of Futures Studies* retrospective concluded his structural diagnosis was substantially valid but his timeline premature: the system is in "intensification phase rather than resolution phase."[24] That is a kind way to say the world did not end on schedule.

Eric Cline, whose *1177 BC* Jiang cites as the foundational text for the Bronze Age analogy, uses the collapse to illustrate how interconnected, low-redundancy systems fail under multiple simultaneous shocks.[25] He does not predict that the contemporary US will collapse within a decade. He draws the systemic-fragility lesson, which is both the lesson Jiang intends and something meaningfully different from the specific prediction Jiang makes.

## THE FERTILIZER CONVERGENCE

Here is the one point in this book where the two lenses do not simply contradict each other.

Both Jiang and Zeihan identify fertilizer-driven famine as a real and developing catastrophe. They converge on the mechanism. They diverge, sharply, on who it kills.

Zeihan stated the fertilizer case directly in March 2026. The Strait of Hormuz closure has knocked Qatar's urea production, roughly 11 percent of global supply, and the Persian Gulf's total ammonia output, roughly 30 to 35 percent of global supply, to zero.[26] "Prepare for an environment where food production on a global basis stalls and then crashes, with some areas affected far more than others." That is Zeihan's language, not Jiang's.

Same mechanism. Different victim.

The mechanism is the same: petroleum and natural gas are the feedstock for nitrogen fertilizer; close the Gulf, and the fertilizer supply chain fractures.

Jiang made the same case from the spring of 2026 onward. "If we didn't have access to fertilizer, we could only grow enough food to support 1 to 2 billion people."[27] Africa and South Asia starve. Refugees flee north. Europe and North America face an influx that "accelerates by maybe 100 times." Sulfur, a fertilizer input, rose 57 percent in price during the US-Iran war.[28] The numbers are moving in the direction Jiang predicted.

The divergence is geography. Zeihan names China and South Asia as the primary victims and explicitly exempts the United States: North America produces its nitrogen from domestic natural gas, can scale up production, and is, on fertilizer, a net exporter to the world that is now starving.[29] Jiang implies the US is among the victims, swept up in the same civilizational breakdown. For Jiang, the refugee crisis that follows is part of what breaks American civil society from the inside.

Same collapse. Who survives it. That is the whole argument.

The outside evidence sits between them, closer to Zeihan on geography but consistent with Jiang on severity. The WFP's Global Report on Food Crises 2026 (April 2026) counted 266 million people in 47 countries in acute food insecurity, 39 million at emergency-level hunger, and 35.5 million children acutely malnourished.[30] By the time of writing, the Sahel alone was tracking above 40 million food-insecure, with projections rising past 50 million for the June through August 2026 lean season.[31] Urea prices surged from $350 per ton in late 2025 to over $800 per ton by March 2026.[32] The FAO Food Price Index rose 2.4 percent month on month in March 2026.[33] Morocco controls roughly 70 percent of global phosphate reserves, and those supplies are not geographically distributed across the global system in any way that provides resilience.[34]

Alfred McCoy specifically noted that the US-Israeli military operation against Iran launched February 28, 2026 struck during the spring fertilizer-shipping season, the critical window for Northern Hemisphere crop planting, and called the timing "beyond belief, ill-advised."[35] His framing is that the food crisis is evidence of geopolitical incompetence and imperial overstretch, not that it is the primary cause of American collapse. But the distinction is finer than it looks: Jiang would say that the overstretch that produces the food crisis is itself the collapse.

What is not in dispute: the famine is real, it is accelerating, and it tracks the mechanism both men identified. The question of who suffers most is an empirical one that 2027 and 2028 will begin to answer.

# Assessment

For the last time in this book, the sourced material ends and the model speaks.

This is the closing chapter of the book, and the question here is not only whether Jiang's prediction holds up. It is whether Predictive History as a method, and Zeihan's structural framework as its rival, have told us something useful about the world that arrived in 2026.

Both men made calls that were too sharp in one direction. Start with what each got right.

Jiang predicted the US-Iran war and its character as a strategic overreach that fails to achieve its stated objectives. On that score the evidence is consistent with his model. He predicted a fertilizer crisis linked to the Hormuz closure. That crisis is documented and measurable, with urea prices more than doubling and Sahel food insecurity already tracking above 50 million people before the lean season ended. He predicted institutional corruption under Trump as an empire-terminal phenomenon. The Zeihan sources describe something real here: a DOJ settlement characterized as a slush fund, an intelligence community effectively silenced, a staffing model that prioritizes loyalty over competence across the Defense Department and federal agencies. The structural diagnosis, debt, overstretch, institutional decay, is not fringe analysis. It is Dalio's analysis, McCoy's analysis, and the IMF's.

What Jiang has not established is the timeline and the mechanism of final collapse. Five to ten years is more aggressive than any mainstream institutional forecast. The peer-reviewed turning-point modeling puts the range at 2032 to 2067. McCoy says 2030. Galtung's 2025 deadline passed without the terminal event. The causal chain from Iranian quagmire to imperial dissolution is stated as prediction in Jiang's work but the precise mechanism, the sequence from military setback to dollar collapse to institutional implosion, is asserted rather than argued. And his Bronze Age framing, while structurally suggestive, is not what Cline himself draws from the historical record as a near-term US prediction.

Zeihan, for his part, has been right about the structural features of American advantage: the natural gas position, the agricultural land, the demographic edge relative to alternatives. The dollar did not collapse on the Iran war; it rose modestly.[36] Capital flight from disrupted markets continues to treat US Treasuries as the baseline instrument, consistent with his model.

What Zeihan underestimated in the 2022 books was the speed and severity of self-inflicted damage. His 2026 video language is more alarmed than his books anticipated. He calls the collapse of US strategic power the greatest he has seen in his lifetime. He describes the Trump administration as a failed presidency inflicting incalculable institutional damage. The short-term dollar trajectory is negative because of policy choices that his framework does not fully account for. His books assumed a gradual, somewhat rational disengagement from global security commitments. What arrived instead was faster, less predictable, and more corrosive than the structural model suggested.

The math had slipped. Not the direction.

The fertilizer case reveals something about both frameworks that is worth sitting with. On the mechanism, they agree: petroleum-based nitrogen fertilizer is what allows the planet to feed eight billion people, and the Hormuz closure fractured that supply chain for a critical planting season. That is not a small convergence. These two men, drawing from radically different analytical premises, arrived at the same causal mechanism independently. That suggests the mechanism is real and load-bearing in the analysis of what 2026 and the years immediately following will produce.

The disagreement on geography, whether the US is among the victims or among the sheltered, is partly an empirical question that events are already beginning to answer, and partly a deeper disagreement about whether internal social fracture from refugee flows can penetrate a country with North American geography. Zeihan's answer is no, not structurally; Jiang's answer is that no geography protects you from the civil conflicts that mass displacement generates inside your borders. Both have precedents.

The book's question was whether either lens predicts better. The honest answer is that neither lens, applied as its author applies it, has survived contact with 2026 intact. Zeihan's structural framework gives the better account of why the dollar did not collapse and why North America is insulated from the worst of the fertilizer shock. Jiang's intentional-engineered framework gives the better account of why the war happened when and how it happened, and why the fertilizer crisis landed on the spring planting season rather than some other season, because decisions were made. Neither framework fully accounts for the speed of US self-inflicted institutional damage, which fell between the two models: too fast and too severe for Zeihan's gradual-disengagement story, but driven less by imperial overreach than by domestic factional politics that Jiang's framework puts under the heading of elite overproduction rather than working out the precise implications.

Across fourteen chapters, Jiang's register tags tell a consistent story: the early steps in each prediction chain often carry FACT labels, while the mechanism steps and the endpoint projections accumulate PREDICTION and SPECULATION tags. The documented facts, the petrodollar arrangement, the Hormuz geography, China's energy dependency, the fertilizer supply chain, are real and sourced. The mechanisms connecting those facts to the claimed endpoints are asserted rather than demonstrated. And the endpoints, Pax Judaica, Bronze Age collapse, American civil war within five years, carry the highest SPECULATION loading of anything in the corpus. That distribution is itself a finding: Jiang's method is strongest at identifying structural conditions and least reliable when deriving specific mechanisms and terminal predictions from those conditions.

Before closing, one accounting is still owed. In Chapter 1, Jiang set himself a three-criterion falsification test, the most rigorous methodological commitment in the entire corpus: ground troops deployed, nuclear weapons not used, Al-Aqsa Mosque destroyed. He stated plainly that missing any one of the three means his entire model is wrong. The nuclear criterion is met in his favor: no tactical nuclear weapons have been used. The ground-troop criterion is partially met: US Marines and the 82nd Airborne were dispatched, but a full-scale ground invasion of the kind Jiang predicted has not been confirmed as of July 2026. The Al-Aqsa criterion is not met: the mosque stands. Jiang himself identified the Al-Aqsa criterion as the definitive falsification test. By his own stated standard, the framework has not been validated, and the Al-Aqsa condition he named as decisive remains unmet. Chapter 11's assessment reached the same verdict at the chapter level. The book's closing synthesis is obliged to name it plainly: Predictive History, as Jiang has defined it, has not passed its own falsification test as of July 2026.

What both men get right, in the end, is the structure of the problem: a heavily indebted, over-militarized, institutionally stressed hegemon entering a period of acute global disruption for which it built minimal redundancy. What they disagree about is how the US sits inside that structure, as the terminal patient or as the last hospital standing. The evidence as of July 2026 is consistent with both readings in some respects and inconsistent with both in others. History will not wait for a clean verdict. It rarely does.

Close the book with the mechanism both men share. Fertilizer keeps eight billion people alive. Petroleum makes fertilizer. The Strait of Hormuz was closed in the spring of 2026. The Sahel is starving. The math holds regardless of which framework you prefer. The only real question is whether the carnage stays on the far side of an ocean, or whether an ocean turns out to be smaller than anyone expected.

The evidence is contested, the confidence moderate. The dollar is the test, as it has been throughout. Its share of global reserves falling below 50 percent, or a sovereign-debt auction failure, within five years would validate Jiang's timeline. The dollar holding above 55 percent and Treasuries retaining safe-haven status through 2031 would falsify it.

# APPENDIX G: ENDNOTES

*Superscript numbers in square brackets in the body text refer to the per-chapter endnotes below.*

## Chapter 1: The Method

1. Philip E. Tetlock, *Expert Political Judgment: How Good Is It? How Can We Know?* (Princeton University Press, 2005). The study tracked 284 experts over the period 1984–2003, collecting approximately 28,000 predictions.

2. Jiang Xueqin, “Psychohistory (The Science of Imagining the Future),” Geo-Strategy END, 2024-06-13; “The Law of Asymmetry,” Game Theory #10, 2026-03-05; “The Law of Escalation,” Game Theory #11, 2026-03-10; “The Law of Eschatological Convergence,” Game Theory #12, 2026-03-12; “The Law of Proximity,” Game Theory #14, 2026-03-19; “Predictive History,” Game Theory #28, 2026-05-26; “The AI Apocalypse,” Game Theory #24, 2026-05-12; “Predictive History Founding Members #1,” 2026-06-07.

3. Peter Turchin and Andrey Korotayev, “The 2010 Structural-Demographic Forecast for the 2010–2020 Decade: A Retrospective Assessment,” *PLOS ONE*, August 17, 2020.

4. Oana-Maria Georgescu, “The Structural-Demographic Theory Revisited: An Empirical Test for Industrialized Societies,” *PLOS ONE*, November 2, 2023.

5. Yascha Mounk, “There Is No Surplus Elite in America,” *Persuasion*, December 5, 2024.

6. Isabela Rocha, “Towards Asimov’s Psychohistory: Harnessing Topological Data Analysis, Artificial Intelligence and Social Media Data to Forecast Societal Trends,” arXiv preprint 2407.03446, July 3, 2024.

7. Good Judgment Project, “The Superforecasters’ Track Record,” Good Judgment Inc. (describing 2011–2015 IARPA ACE tournament results). Superforecasters outperformed US intelligence analysts with classified access by over 30%.

# Chapter 2: The Four-Power Chessboard

1. Law of Eschatological Convergence introduced formally. (Jiang Xueqin, “Game Theory #12 The Law of Eschatological Convergence,” YouTube, 2026-03-12)

2. Four powers defined by capacity to mobilize total populations through ideological coherence. (Jiang Xueqin, “Game Theory #23 The WWIII Chessboard,” YouTube, 2026-05-07)

3. US grand strategy dual framing: petrodollar empire and Greater North America Technate. (Jiang Xueqin, “Game Theory #9 The US-Iran War,” YouTube, 2026-03-03; “Game Theory #18 Trump World Order,” YouTube, 2026-04-02)

4. Petrodollar mechanism: GCC oil priced in dollars forces global dollar demand. (Jiang Xueqin, “Game Theory #9 The US-Iran War,” YouTube, 2026-03-03)

5. US war against Iran described as structural compulsion, not strategic choice. (Jiang Xueqin, “Professor Jiang World War 3 Is About To Begin,” YouTube, 2026-05-07)

6. Trump-as-genius hypothesis: deliberately destroying petrodollar to build Greater North America. (Jiang Xueqin, “Game Theory #18 Trump World Order,” YouTube, 2026-04-02)

7. Alexander Dugin, *Foundations of Geopolitics* (1997): Eurasian landpower strategy, Berlin-Moscow-Tehran-Tokyo axes, Turkey as enemy, Anglo-American chaos operations. (Jiang Xueqin, “Geo-Strategy Update #7 When Eschatologies Converge,” YouTube, 2025-08-01)

8. Putin as katechon and Third Rome doctrine; Moscow as heir to Constantinople. (Jiang Xueqin, “Geo-Strategy Update #7 When Eschatologies Converge,” YouTube, 2025-08-01; “Game Theory #23,” YouTube, 2026-05-07)

9. Greater Israel Project and Kabbalistic accelerationism: thesis-antithesis-synthesis as cosmic law. (Jiang Xueqin, “Game Theory #23 The WWIII Chessboard,” YouTube, 2026-05-07; “Geo-Strategy Update #3 The Messianic Calling,” YouTube, 2025-06-25)
10. Rescue of Rebbe Yosef Yitzchak from Nazi Warsaw 1939: documented in Joseph Telushkin biography; cited as proof-of-concept for cross-state eschatological coordination. (Jiang Xueqin, “Game Theory #12 The Law of Eschatological Convergence,” YouTube, 2026-03-12)
11. Netanyahu quotation on reading Jews Against Rome: “we lost that. That’s why I think we have to win the next one.” Jiang infers “Rome” means the United States. (Jiang Xueqin, “Game Theory #12 The Law of Eschatological Convergence,” YouTube, 2026-03-12)
12. Peter Hoekstra Jerusalem speech approximately 2018: described 1917, 1948, 1967, 2017 as divine miracles; called for rebuilding Solomon’s Temple. (Jiang Xueqin, “Game Theory #12 The Law of Eschatological Convergence,” YouTube, 2026-03-12)
13. Iran’s grand strategy: Zoroastrian light-dark cosmos and Shia Karbala martyrdom paradigm as operational ideology. (Jiang Xueqin, “Game Theory #23 The WWIII Chessboard,” YouTube, 2026-05-07; “Geo-Strategy Update #3 The Messianic Calling,” YouTube, 2025-06-25)
14. Millennium Challenge 2002: General Paul Van Riper commanding Red Team used asymmetric warfare, sank US fleet Day 1; Pentagon reset simulation and declared asymmetric tactics out of bounds. (Jiang Xueqin, “Geo-Strategy #1 Iran’s Strategy Matrix,” YouTube, 2024-04-24)
15. Iranian Foreign Minister Zarif NBC interview 2026: asked if Iran fears US ground troops, replied “No, we are waiting for them.” (Jiang Xueqin, “Game Theory #12 The Law of Eschatological Convergence,” YouTube, 2026-03-12)
16. Convergence points across six eschatological traditions: Middle East global war, Greater Israel, Third Temple, Gog and Magog, US civil war, China collapse, antichrist figure. (Jiang Xueqin, “Game Theory #12,” YouTube,

2026-03-12; “Geo-Strategy Update #7,” YouTube, 2025-08-01; “Secret History #END Pax Judaica,” YouTube, 2025-12-18)

17. Messianic leader profile: divine energy, fearlessness, persecution complex; applied to Trump, Netanyahu, Khamenei. (Jiang Xueqin, “Geo-Strategy Update #3 The Messianic Calling,” YouTube, 2025-06-25)

18. Senator Blumenthal post-briefing statement 2026: war unbudgeted, ground troops a live prospect, Russia already aiding Iran. (Jiang Xueqin, “Game Theory #12 The Law of Eschatological Convergence,” YouTube, 2026-03-12)

19. Three headline predictions staked on the model: ground troops deployed, no tactical nuclear weapons used, Al-Aqsa Mosque destroyed. Jiang: “If they do not destroy the Al-Aqsa Mosque… my predictive model, my analysis is completely wrong.” (Jiang Xueqin, “Game Theory #12 The Law of Eschatological Convergence,” YouTube, 2026-03-12)

# Chapter 3: The Nature of Reality

1. Jiang’s statement of the Kantian premise as the foundation of his framework. (Jiang Xueqin, “Secret History #1: How Power Works,” YouTube, 2025-08-21)

2. Durkheim quotation on religion as collective imagination, cited by Jiang. (Jiang Xueqin, “Civilization #2: Religion and the Dawn of Society,” YouTube, 2024-09-03)

3. Jiang’s named concept: “power is alchemy, turning nothing into everything.” (Jiang Xueqin, “Secret History #1: How Power Works,” YouTube, 2025-08-21)

4. Jiang’s explicit mapping of Plato’s cave onto the financial control system; quote: “the elite create puppets … and money is what coordinates our collective imagination.” (Jiang Xueqin, “Game Theory #17: The Great Reset,” YouTube, 2026-03-31)

5. Internal inconsistency in Jiang’s use of the cave allegory: liberating device in Civilization #10; architecture of control in Game Theory #17. (Jiang Xueqin,

“Civilization #10: The Trial of Socrates and Plato’s Allegory of the Cave,” YouTube, 2024-10-22; “Game Theory #17: The Great Reset,” YouTube, 2026-03-31)

6. Jiang’s description of the BIS as “the central bank of central banks” and his genealogy of the Federal Reserve to City of London interests. (Jiang Xueqin, “Game Theory #17: The Great Reset,” YouTube, 2026-03-31; “Game Theory #6: The World’s Bank,” YouTube, 2026-01-22)

7. Jiang’s formulation: “History is the false memory of a nation state.” (Jiang Xueqin, “Secret History #1: How Power Works,” YouTube, 2025-08-21)

8. Tanner Mirrlees paper from Brown University’s Costs of War project: Hollywood-Pentagon co-production funding and script approval arrangements; over 2,500 productions documented. (Jiang Xueqin, “Game Theory #19: The Hollywood-Pentagon Complex,” YouTube, 2026-04-07; Mirrlees cited by name and institution)

9. Jessica Lynch (2003): fabricated rescue narrative subsequently retracted by Lynch in Congressional testimony. (Jiang Xueqin, “Game Theory #19: The Hollywood-Pentagon Complex,” YouTube, 2026-04-07)

10. Jiang’s prediction that the Pentagon’s colonization by Hollywood myth-making produces strategic incompetence in the Iran war. (Jiang Xueqin, “Game Theory #19: The Hollywood-Pentagon Complex,” YouTube, 2026-04-07)

11. Adam Lebor, *Tower of Basel*: Nazi Germany routing financial transactions through Basel during WWII; BIS operational across enemy lines; post-war role in Marshall Aid consumerist propaganda. (Jiang Xueqin, “Game Theory #17: The Great Reset,” YouTube, 2026-03-31; passages read aloud in class)

12. Jiang’s quote on engineered collapse: “You can make more money from collapsing the system than just letting it go on.” Andrew Ross Sorkin book cited as foil. (Jiang Xueqin, “Game Theory #17: The Great Reset,” YouTube, 2026-03-31)

13. John Paulson 2008: approximately $20 billion profit shorting mortgage securities; offered by Jiang as evidence of engineered collapse. (Jiang Xueqin, “Game Theory #17: The Great Reset,” YouTube, 2026-03-31)

14. Jiang’s “accident” framing of the manufactured reality system, in direct tension with the conspiracy framing of later episodes. (Jiang Xueqin, “Secret History #1: How Power Works,” YouTube, 2025-08-21)

15. Jiang’s epistemic contradiction: Kantian humility claimed alongside confident revelation of hidden truth. (Jiang Xueqin, “Secret History #1: How Power Works,” YouTube, 2025-08-21; “Civilization #55: Kant, Hegel, and the Theory of Everything,” YouTube, 2025-05-27)

16. Jiang’s selective use of neuroscience as validation versus dismissal of “the religion of science” as an instrument of control. (Jiang Xueqin, “Civilization #2: Religion and the Dawn of Society,” YouTube, 2024-09-03; “Secret History #1: How Power Works,” YouTube, 2025-08-21)

# Chapter 4: Two Maps of the Same Collapse

1. Jiang’s Kantian-Platonic epistemological premise as the foundation of the intentional-engineered framework. (Jiang Xueqin, “Secret History #1: How Power Works,” YouTube, 2025-08-21; “Game Theory #17: The Great Reset,” YouTube, 2026-03-31)

2. Jiang’s characterization of the petrodollar as “a Ponzi scheme” and the dollar as the sole basis of US imperial power. (Jiang Xueqin, “Professor Jiang: World War 3 Is About To Begin,” YouTube, 2026-05-07)

3. Jiang’s Law of Eschatological Convergence: identify the most extreme version of each tradition, find convergence points, predict behavior. (Jiang Xueqin, “Game Theory #12: The Law of Eschatological Convergence,” YouTube, 2026-03-12; “Geo-Strategy Update #7: When Eschatologies Converge,” YouTube, 2025-08-01)

4. Jiang’s four Laws as the predictive apparatus: Asymmetry, Escalation, Proximity, Eschatological Convergence. (Jiang Xueqin, “Game Theory #10:

The Law of Asymmetry," YouTube, 2026-03-05; "Game Theory #11: The Law of Escalation," YouTube, 2026-03-10; "Game Theory #14: The Law of Proximity," YouTube, 2026-03-19; "Game Theory #12: The Law of Eschatological Convergence," YouTube, 2026-03-12)

5. Jiang's explicit falsification criterion: all three predictions must be correct or the model is invalid. (Jiang Xueqin, "Game Theory #11: The Law of Escalation," YouTube, 2026-03-10; "Game Theory #12: The Law of Eschatological Convergence," YouTube, 2026-03-12)

6. Jiang's stated downstream consequence of US defeat: "endless war and the deaths of millions and billions of people." (Jiang Xueqin, "Geo-Strategy END: Psychohistory (The Science of Imagining the Future)," YouTube, 2024-06-13)

7. Zeihan's foundational counter-thesis: no grand plan, no great conspiracy; impersonal forces. (Peter Zeihan, *The Accidental Superpower*, 2014, Chapter 1 "The World We Think We Know")

8. Zeihan on the three components of Bretton Woods as a Cold War strategic transaction. (Peter Zeihan, *The Accidental Superpower*, 2014, Chapter 5 "Buying Off Geopolitics")

9. Zeihan on the bipartisan, incremental disengagement across three post-Cold War presidents. (Peter Zeihan, *The Accidental Superpower*, 2014, Chapter 5; *The End of the World is Just the Beginning*, 2022)

10. Zeihan on demographic collapse as the co-equal structural driver of globalization's end. (Peter Zeihan, *The End of the World is Just the Beginning*, 2022, Introduction)

11. Zeihan on the accidental and geographic nature of American power; verbatim quote. (Peter Zeihan, *The Accidental Superpower*, 2014, Chapter 1)

12. Zeihan on the US "accidentally stumbling into superpowerhood." (Peter Zeihan, *The Accidental Superpower*, 2014, Chapter 5)

13. Zeihan on dollar dominance as a structural accident of post-WWII capacity, not a managed system. (Peter Zeihan, *The End of the World is Just the Beginning*, 2022, “From Success, Failure”)

14. Zeihan on Nixon’s 1971 fiat decision as a crisis response, not strategic design; “The Americans found themselves hostage to their own master plan.” (Peter Zeihan, *The End of the World is Just the Beginning*, 2022, “From Success, Failure”)

15. Zeihan on Trump’s alliance dismantling as catastrophic error: “the fastest reduction in American strategic power in our lifetimes” and “the most stupid thing that we could do.” (Peter Zeihan, “How to End American Power,” YouTube, 2026-04-09)

16. Zeihan on US privateering in April 2026 as a consequence of cascading events, not controlled design. (Peter Zeihan, “Say Goodbye to the Global Order,” YouTube, 2026-04-21)

17. Zeihan on WTO collapse as 28-year institutional dysfunction, not engineered breakdown. (Peter Zeihan, “The End of the WTO,” YouTube, 2026-04-10)

18. Dollar appreciation of approximately 2 percent at the opening of the US-Iran war, noted by Zeihan as contrary to petrodollar-collapse prediction. (Peter Zeihan, “The U.S. Dollar: Short vs. Long Term,” Zeihan on Geopolitics, 2026-03-19, addendum)

19. Zeihan on China’s crude import dependency: 80 percent imported, 75 percent from the Persian Gulf. (Peter Zeihan, “Is Now a Good Time for China to Invade Taiwan?” Zeihan on Geopolitics, 2026-05-21)

20. Jiang’s hypothetical “Trump-as-genius” reading: destroying the petrodollar to build Greater North America. Explicitly framed as a hypothesis, not his prediction. (Jiang Xueqin, “Game Theory #18: Trump World Order,” YouTube, 2026-04-02)

21. Zeihan's dismissal of BRICS de-dollarization; dollar share of global reserves declining. (Peter Zeihan, Zeihan on Geopolitics, 2025-2026; reserve share data per IMF COFER)

22. Jiang's claim that he predicted Trump's election, US attack on Iran, and US defeat from his June 2024 Game Theory class. (Jiang Xueqin, "Geo-Strategy END: Psychohistory (The Science of Imagining the Future)," YouTube, 2024-06-13)

23. Jiang's three explicit falsification predictions: ground troops deployed, no nuclear use, Al-Aqsa Mosque destroyed. Status as of July 2026: nuclear weapons not used (consistent); ground troops at scale not confirmed; Al-Aqsa Mosque not destroyed (inconsistent). (Jiang Xueqin, "Game Theory #11: The Law of Escalation," YouTube, 2026-03-10; "Game Theory #12: The Law of Eschatological Convergence," YouTube, 2026-03-12)

24. Jiang reading David Bromwich's email and acknowledging the speculative character of his method. (Jiang Xueqin, "Game Theory #24: The AI Apocalypse," YouTube, 2026-05-12)

25. Jiang's account of the 1939 Chabad Lubavitch rescue of the Lubavitcher Rebbe from Nazi Warsaw, as documented in Joseph Telushkin's biography *Rebbe*, offered as evidence for eschatological coordination across enemy state lines. (Jiang Xueqin, "Game Theory #12: The Law of Eschatological Convergence," YouTube, 2026-03-12)

# Chapter 5: The Petrodollar War

1. Petrodollar arrangement, historical sequence (Bretton Woods 1944, Nixon 1971, Saudi deal 1973). (Jiang Xueqin, "Civilization #END: The Decline and Fall of the American Empire," YouTube channel, 2025-06-12; "Game Theory #9: The US-Iran War," YouTube channel, 2026-03-03)

2. Three strategic objectives of Iran war (demonstrate military power, control oil, control shipping lanes); Strait of Hormuz 20 percent of world oil. (Jiang Xueqin, "Geo-Strategy #3: How Empire is Destroying America," YouTube

channel, 2024-05-10; “Game Theory #9: The US-Iran War,” YouTube channel, 2026-03-03)

3. Ground invasion prediction stated April 2024; all-players-want-ground-troops game-theory argument. (Jiang Xueqin, “Geo-Strategy #1: Iran’s Strategy Matrix,” YouTube channel, 2024-04-24; “Geo-Strategy Update #2: WWIII Begins, Let’s Game Theory,” YouTube channel, 2025-06-22; “Game Theory #11: The Law of Escalation,” YouTube channel, 2026-03-10)

4. Drone cost asymmetry: Shahed $35,000-$50,000; THAAD intercept $1 million; GCC water/food vulnerability: 60% water from desalination, 80% food imported, Dubai 17,000% water stress. (Jiang Xueqin, “Game Theory #9: The US-Iran War,” YouTube channel, 2026-03-03)

5. Dollar collapse prediction upon US retreat from Middle East. (Jiang Xueqin, “Game Theory #18: Trump World Order,” YouTube channel, 2026-04-02)

6. Operation Southern Spear, January 7,

7. Iranian Foreign Minister Zarif NBC News interview: “we are waiting for them.” (Jiang Xueqin, “Game Theory #12: The Law of Eschatological Convergence,” YouTube channel, 2026-03-12)

8. Netanyahu February 11, 2026 pitch deck; Trump ordered carriers to sail over Rubio and Cain objections. (Peter Zeihan, “Why Nobody Came to Help the U.S. in Iran,” YouTube channel, 2026-07-14)

9. Bretton Woods as Cold War anti-Soviet instrument, not dollar-maintenance mechanism; shale revolution removing US structural dependency on Middle East oil. (Peter Zeihan, “The End of the World is Just the Beginning,” Portfolio/Penguin, 2022; “The Accidental Superpower,” Twelve, 2014, Chapter 7)

10. Dollar rose modestly, approximately 2 percent, on war start. (Peter Zeihan, “The U.S. Dollar: Short vs. Long Term,” YouTube channel, 2026-03-19, addendum)

11. Ground troops: Marines from USS Tripoli, USS Boxer, 82nd Airborne, approximately 8,000 troops; deployment framed as likely “debacle.” (Peter Zeihan, “U.S. Ground Troops Coming to Iran,” YouTube channel, 2026-04-02)

12. Iran protection racket: $2 million per vessel to transit Hormuz under ceasefire. (Peter Zeihan, “The Strait of Hormuz Remains Open…For Iran,” YouTube channel, 2026-04-03)

13. Russia provided real-time targeting data enabling Iran to strike US AWACS at Prince Sultan Air Base, Saudi Arabia. (Peter Zeihan, “Russia Draws American Blood in Iran,” YouTube channel, 2026-04-07)

14. June 2026 draft deal: US to release frozen Iranian funds, pay $300 billion reparations, lift sanctions, grant Iran right to regulate Hormuz; Zeihan: “complete strategic capitulation.” (Peter Zeihan, “The Long Awaited Iran Deal,” YouTube channel, 2026-06-19)

15. US strategic retreat: “the greatest collapse in strategic power that I have seen in my life.” (Peter Zeihan, “How to End American Power,” YouTube channel, 2026-04-09)

16. CFR survey of Trump administration’s five stated objectives for the Iran war. (Multiple Authors including Takeyh, Abrams, Boot, Robinson, Cook, Ewers, “Gauging the Impact of U.S.-Israeli Strikes on Iran,” Council on Foreign Relations, 2026-02-28)

17. CRS Report R48887 confirming stated rationales; “intention to capture Iran’s oil and gas resources” as additional stated motive. (Congressional Research Service, “U.S. Conflict with Iran,” CRS Report R48887, 2026-03-26)

18. Netanyahu domestic political motivation; Jahshan on coordination with Trump. (Multiple Authors including Dunne, Hawthorne, Jahshan, Sheline, “The US-Israel War on Iran: Analyses and Perspectives,” Arab Center DC, 2026-03-02)

19. Setser: petrodollar narrative “misunderstands what actually sustains the dollar system”; petrodollar recycling largely dissipated by
20. Kamin regression analysis: dollar movements explained by oil prices, VIX, interest rate differentials, not petrodollar system defense. (Steven B. Kamin, “The Dollar, Safe-Haven Demand, and the Iran War,” American Enterprise Institute, 2026-06-30)
21. Dollar rose 2.2 percent since war began; Bloomberg: war “solidified dollar’s role as reserve currency.” (Bloomberg Opinion, “Iran War Has Solidified the Dollar’s Role as Reserve Currency,” 2026-04-07)
22. Deutsche Bank: Iran conflict “could be remembered as a key catalyst for erosion in petrodollar dominance, and the beginnings of the petroyuan.” (Deutsche Bank analysts, quoted in Fortune, 2026-04-07)
23. Aaron Brown: the Iran war “broke the petrodollar.” (Aaron Brown, “The Iran war just broke the petrodollar,” Japan Times, 2026-04-13)
24. Prashad: “Oil-Dollar-Wall Street complex defending financial hegemony”; Iran yuan-denominated oil trade as structural motive. (Vijay Prashad, “A Primer on the Petrodollar and the War on Iran,” Tricontinental: Institute for Social Research, 2026-04-16)
25. Moti: dollar preservation as war motive, military action counterproductive. (Altaf Moti, “The petro-hegemony at risk: How the 2026 Iran war could unseat the dollar,” Middle East Online, 2026-03-27)
26. Franklin Templeton response calling Deutsche Bank petrodollar analysis “remarkably simplistic.” (Fortune, 2026-04-07)
27. Sachs and Fares: US retreat likely; cost asymmetry ($20,000 drones vs. $4 million interceptors); Iran to gain operational control of Strait. (Jeffrey D. Sachs and Sybil Fares, “The war on Iran will likely end in American retreat,” Al Jazeera Opinion, 2026-05-09)

28. Soufan Center: “strategic dead end”; predicted “no war, no peace” stasis. (Gaby Tejeda, “No End to the U.S.-Iran War in Sight,” Soufan Center IntelBrief, 2026-07-13)

29. WarCosts.org: 136-plus days of conflict; approximately $830 million per day; $103-113 billion total US expenditure. (WarCosts.org, “Iran War (2026) - Cost, Casualties & Analysis,” continuously updated)

30. Polymarket: 80 percent probability against US invasion of Iran before

31. June 17, 2026 Memorandum of Understanding collapsed July 8, 2026; US reimposed naval blockade July 14,

# Chapter 6: The Tanker War

1. Shadow fleet size approximately 1,000 tankers, described by Jiang as “essentially Russia’s navy.” (Jiang Xueqin, “Game Theory #19: The Hollywood-Pentagon Complex,” 2026-04-07; “Professor Jiang: World War 3 Is About To Begin, Let Me Explain!,” 2026-05-07)

2. Five chokepoints named consistently: Hormuz, Malacca, Panama, Greenland/Arctic, Gibraltar; Cape of Good Hope and Arctic Circle added in later episodes. (Jiang Xueqin, “Game Theory #19,” 2026-04-07; “Substack Founding Members Livestream #2,” 2026-07-11)

3. US National Defense Strategy January 2026 cited as authorizing chokepoint control as imperial strategy; four pillars: secure Western Hemisphere, control chokepoints, contain China via Malacca, rebuild defense industrial base. (Jiang Xueqin, “Game Theory #21: World War Trump,” 2026-04-21; “Game Theory #23: The WWIII Chessboard,” 2026-05-07)

4. Operation Southern Spear, January 7, 2026: two sanctioned shadow-fleet tankers intercepted in Caribbean and North Atlantic, described as “stateless sanctioned dark fleet vessels” carrying oil linked to Venezuela, Iran, and Hezbollah. (Jiang Xueqin, “Professor Jiang: World War 3 Is About To Begin, Let Me Explain!,” 2026-05-07)

5. US boarding of Iranian cargo ship Tusca and unnamed Indian vessel suspected of carrying missile components, April

6. Hegseth clip on piracy juxtaposed with news anchor confirming US tanker seizures; Jiang quote on rules-setting. (Jiang Xueqin, "Game Theory #21: World War Trump," 2026-04-21)

7. Jiang direct quote on attrition logic: shadow fleet militarization aims to degrade US naval capacity over time, not to defeat the US Navy outright. (Jiang Xueqin, "Game Theory #19: The Hollywood-Pentagon Complex," 2026-04-07)

8. China financing shadow fleet militarization: labeled SPECULATION by Jiang himself. (Jiang Xueqin, "Professor Jiang: World War 3 Is About To Begin, Let Me Explain!," 2026-05-07)

9. Ocean conflict between Russia and US framed as a 1-2 year process with no single flashpoint. (Jiang Xueqin, "Game Theory #19: The Hollywood-Pentagon Complex," 2026-04-07; "Professor Jiang: World War 3 Is About To Begin, Let Me Explain!," 2026-05-07)

10. Shadow fleet dismemberment through distributed enforcement: US, Ukraine drones, Sweden, Belgium, France, India; Sweden found Russian military personnel aboard Baltic vessel. (Peter Zeihan, "The Beginning of the End of the Shadow Fleet," 2025-12-30; "The US Navy Just Seized a Russian Tanker," 2026-01-07; "The End of the Shadow Fleet, French Edition," 2026-02-02; "India Takes on the Shadow Fleet (Bonus Video)," 2026-02-18; "Belgium Seizes Shadow Fleet Vessel," 2026-03-09; "Sweden Grabs Its First Shadow Fleet Vessel," 2026-03-17)

11. US Navy seized Russian-flagged tanker off Iceland, January 7, 2026, in defiance of Russian state demand; Zeihan calls it first such seizure in modern history; "It is game on for the entire shadow fleet." (Peter Zeihan, "The US Navy Just Seized a Russian Tanker," 2026-01-07)

12. Russia "lacks large surface combat vessels needed for global maritime patrol operations"; Russian Navy prioritizes 600-1,000 km near-sea zone.

(SWP, Helge Adrians, “Russia’s Limited Capabilities to Protect Its Shadow Fleet,” SWP-Aktuell 2026/A 17, 2026-04-02)

13. Iran shut Strait of Hormuz at war opening; 1,000-plus tankers trapped inside Persian Gulf; 10-13 million barrels per day eliminated. (Peter Zeihan, “This Ain’t Your Father’s Tanker War,” 2026-05-13; “A Massive Energy Break Coming Soon,” 2026-06-12)

14. Iran protection-racket toll system at Imam Khomeini Port, approximately $2 million per vessel; IRGC income increased during opening weeks of war. (Peter Zeihan, “The Strait of Hormuz Remains Open…For Iran,” 2026-04-03)

15. As of July 7, 2026: strait technically open under peace framework but running at 20 ships per day versus pre-war 100-150 per direction; Iran and Oman discussing fee arrangements; Zeihan quote on “ongoing catastrophic economic and strategic event.” (Peter Zeihan, “Status Update on the Persian Gulf,” 2026-07-07)

16. Three structural differences from 1980s Tanker War: conflict type, US Navy size, weapons technology; US Navy under 300 ships, 60 destroyers half carrier-dedicated; Zeihan quote on fourth-rate security power. (Peter Zeihan, “This Ain’t Your Father’s Tanker War,” 2026-05-13)

17. Shadow fleet size estimates: Ukrainian government catalog 1,337 vessels (February 2026); Ukrainian Foreign Intelligence Service over 1,100 tankers (December 2025); S&P Global approximately 1,000 vessels, 17-18.5 percent of global fleet, 591 moving Russian oil. (Liga.net citing Ukrainian Foreign Intelligence Service / SZR, December 2025; Liga.net citing Vladyslav Vlasiuk, May 2026; S&P Global Market Intelligence cited in CSIS, Jensen and Macias, “Ghost Busters,” December 2025, revised February 2026)

18. CSIS core estimate: 155-591 Russia-linked vessels transporting approximately 3.7 million barrels per day. (CSIS, Benjamin Jensen and Jose M. Macias III, “Ghost Busters: Options for Breaking Russia’s Shadow Fleet,” December 15, 2025, revised February 12, 2026)

19. Bella-1 (also called Marinera) case study: AIS disabled 17 times in Iranian waters; 379 rendezvous events off Iran; Russia reportedly dispatched submarine escort during pursuit; seized January 7,

20. UK seized Smyrtos, June 14, 2026: Cameroon-flagged, 700,000 barrels of Russian oil, predawn English Channel raid by Royal Marines; first UK-led boarding; six other tankers immediately changed course. (Al Jazeera, Caolan Magee, “UK seizes Russian ‘shadow fleet’ tanker, what that means,” June 16, 2026)

21. Operation MoLoChKa, July 6-16, 2026: Ukrainian Unmanned Systems Forces struck 147 Russian-linked vessels in 11 days, 117 Sea of Azov, 30 Black Sea; IMO condemned the attacks. (gCaptain, Mike Schuler, “Ukraine Says Drone Campaign Has Hit 147 Russian-Linked Vessels in 11 Days,” July 16, 2026)

22. Su-35 deployed by Russia when Estonia attempted to stop tanker Jaguar, May 2025; CEPA identifies this as first overt military intervention to protect a shadow fleet vessel. (CEPA, Meelis Oidsalu, “Why Russia’s Shadow Fleet Sails Unhindered,” December 18, 2025)

23. Russia formally escorted shadow fleet vessels with Boykiy, a Project 20380 Steregushchiy-class missile corvette, through Gulf of Finland, June 16, 2026; first such formal naval escort. (The National, Sunniva Rose, “Russia Arms ‘Shadow Fleet’ Tanker in Response to European Interceptions,” July 2, 2026)

24. Russia arming tankers with automated weapons; Wagner Group and FSB-linked personnel embedded aboard shadow fleet vessels. (CIMSEC, Catherine Marie Abbott, “Covert Maritime Intelligence and Russia’s Shadow Fleet,” July 13, 2026)

25. Russia’s naval shadowing characterized as “reinforcing a signaling dynamic, conveying both awareness and deterrence without direct escalation.” (Center for Maritime Strategy, Antonio De Santis, “The Intensification of Russian Shadow Fleet Activities,” February 10, 2026)

26. Seven vessels seized against fleet of roughly 1,900: 0.4 percent annual loss rate, against 40-80 percent per-voyage profit premiums; insufficient for deterrence. (CSIS, Jose M. Macias III, "What the Bella-1 Teaches Us About Targeting Shadow Fleets," January 8, 2026)
27. Aggressive enforcement modeled to reduce Russian federal tax revenues from Baltic crude by only 5.6-14.0 percent; Brookings recommends financial and regulatory approach over naval interdiction; physical interference appropriate only in "extraordinary circumstances." (Brookings Institution, Robin Brooks, Ben Harris, Harold Hongju Koh, Liam Marshall, Kate Davidson, "Stiffening European Sanctions Against the Russian Oil Trade," February 3, 2026)
28. IISS: "no 'silver bullet' solution"; escalation considerations include "potential retaliation, international fragmentation of shipping norms, and capacity constraints among Western states." (IISS, Nick Childs, "Russia's Shadow Fleet and Sanctions Evasion: What Is To Be Done?," January 31, 2025)
29. Shadow fleet framed as challenge to maritime law and data infrastructure, not bilateral naval war; "The Next Maritime Crisis" framing. (Forbes, Jill Goldenziel, "Forget Hormuz. The Shadow Fleet Is The Next Maritime Crisis," June 26, 2026)

# Chapter 7: The US-China Grand Bargain

1. Jiang's two linked predictions: no Taiwan war and a US-China grand bargain in
2. Jiang's statement that a Chinese invasion of Taiwan would destroy his model. (Jiang Xueqin, "Game Theory #25: Trump Visits China," video, 2026-05-14, and "Substack Founding Members Livestream #2," 2026-07-11)
3. US national debt figure of $39 trillion. (Jiang Xueqin, "Professor Jiang World War 3 Is About To Begin, Let Me Explain!" video, 2026-05-07)

4. Jiang's "China as hallucination of a hallucination" framework, China created by American capital, dollar-denominated, structurally unable to decouple. (Jiang Xueqin, "Game Theory #25: Trump Visits China," video, 2026-05-14)
5. China's energy dependence on the Middle East: 50-60%. (Jiang Xueqin, "Professor Jiang World War 3 Is About To Begin, Let Me Explain!" video, 2026-05-07)
6. Power of Siberia 2 pipeline unsigned as of the Putin-Xi May 2026 summit. (Jiang Xueqin, "Game Theory #27: Putin Enters the Chat," 2026-05-21)
7. Trump-Xi Beijing summit, May 14,
8. Composition of the US business delegation to Beijing, May
9. Scott Bessent leading the US delegation rather than Secretary of State Rubio; Jiang's reading of this as a financial rather than diplomatic negotiation. (Jiang Xueqin, "Game Theory #25: Trump Visits China," 2026-05-14)
10. Jensen Huang boarding Air Force One in Alaska during the refueling stop. (Jiang Xueqin, "Game Theory #25: Trump Visits China," 2026-05-14)
11. GENIUS Act and Clarity Act as enacted legislation requiring stablecoins to hold US Treasuries as reserves. (Jiang Xueqin, "Game Theory #25: Trump Visits China," 2026-05-14; "Game Theory #29: Final Examination," 2026-05-28)
12. China receives Western Hemisphere energy, US market access, and Nvidia chips in the proposed deal. (Jiang Xueqin, "Professor Jiang World War 3 Is About To Begin, Let Me Explain!" 2026-05-07; "Game Theory #25: Trump Visits China," 2026-05-14)
13. Jiang's Taiwan-as-bargaining-chip argument: US shifts policy toward unification and transfers the containment burden to Japan and South Korea. (Jiang Xueqin, "Game Theory #25: Trump Visits China," 2026-05-14)

14. Araghchi met only Wang Yi in Beijing, not Xi Jinping. When Araghchi visited Moscow, Putin met him personally for ninety minutes. (Jiang Xueqin, “Game Theory #25: Trump Visits China,” 2026-05-14)

15. Jiang’s internal contradiction: China described as geopolitically irrelevant in one episode and as the central financial pivot in the next. (Jiang Xueqin, “Game Theory #23: The WWIII Chessboard,” video, 2026-05-07; “Professor Jiang World War 3 Is About To Begin, Let Me Explain!” video, 2026-05-07)

16. Jiang’s “theater” framing of current US-China friction applied selectively. (Jiang Xueqin, “Game Theory #25: Trump Visits China,” video, 2026-05-14)

17. Jiang describing Trump as “a reality TV star” in one episode and praising the Taiwan-concession logic as “very strategic and smart” in another. (Jiang Xueqin, “Professor Jiang World War 3 Is About To Begin, Let Me Explain!” video, 2026-05-07; “Game Theory #25: Trump Visits China,” video, 2026-05-14)

18. Zeihan on CMC purge: two members remaining, neither with meaningful military experience. (Peter Zeihan, “Purging China’s Central Military Commission,” video, 2026-02-03)

19. China imports approximately 80% of the crude it uses, and about 75% of that comes from the Persian Gulf. (Peter Zeihan, “Is Now a Good Time for China to Invade Taiwan?” video, 2026-05-21)

20. Zeihan’s energy-stranglehold argument: US Navy in the Persian Gulf could shut off energy flows to China within a year, producing famine-level consequences. (Peter Zeihan, “Is Now a Good Time for China to Invade Taiwan?” video, 2026-05-21)

21. Typhon and Type-88 missile systems deployed in the Philippines and by Japan. (Peter Zeihan, “Taking Naval Options Away from China,” video, 2026-05-26)

22. Zeihan characterizing the May 2025 tariff truce as "dial back tariffs to Liberation Day levels and talk." Eight-year system runway. (Peter Zeihan, "The Fire Hose of Chaos: The 'Deal' With the Chinese," video, 2025-05-20)

23. Panama expelled Chinese port operators March 2026, courts finding contracts were secured by bribery. (Peter Zeihan, "Panama Boots China from the Canal," video, 2026-03-06)

24. Luo Ping, director-general of China Banking Regulatory Commission, 2009: "We hate you guys but there is nothing much we can do" on US Treasuries as the only reserve option. (Cited by Peter Zeihan, *The Accidental Superpower*, 2014, China Wars chapter)

25. China's birth rate at most 1.3 children per woman, "among the lowest of any people throughout human history." (Peter Zeihan, *The End of the World is Just the Beginning*, 2022, demography chapter)

26. Average age in China officially 44-45, likely closer to 54 or higher given data quality. (Peter Zeihan, "Forced Reproduction in China: The 3-Child Policy," video, 2026-01-02)

27. China had more people aged 54 and over than under 54 as of October

28. Xi's June 2026 visit to Pyongyang failed to bring North Korea back into the Chinese sphere; Kim Jong Un now independent of both Beijing and Moscow. (Peter Zeihan, "China No Longer Controls North Korea," video, 2026-06-16)

29. White House fact sheet, May 2026: China committed $17 billion/year in agricultural purchases, 200 Boeing 737-series jets, US oil and LNG imports; US-China Board of Trade and Board of Investment established; joint Hormuz commitment. (White House, "Fact Sheet: President Donald J. Trump Secures Historic Deals with China," May 2026)

30. China's behavior during the Hormuz crisis: reduced crude imports from roughly 11.7 million barrels/day to under 9 million; Trump reporting Xi offered to broker Iran peace and pledged no military equipment to Iran

while continuing oil purchases. (White House, “Fact Sheet: President Donald J. Trump Secures Historic Deals with China,” May 2026; Zongyuan Zoe Liu, CFR, “China and the U.S. Agreed to ‘Strategic Stability’ in Beijing. They Don’t Define It the Same Way,” 2026-05-18)

31. Zongyuan Zoe Liu, CFR: summit represents “managed rivalry through bilateral bargaining,” not grand bargain; divergent US-China definitions of “strategic stability”; Taiwan omitted from White House readout. (Zongyuan Zoe Liu, CFR, “China and the U.S. Agreed to ‘Strategic Stability’ in Beijing. They Don’t Define It the Same Way,” 2026-05-18)

32. Jiahao Yuan: summit was “theater masking deeper structural conflict”; prediction of “a decade of managed conflict.” (Jiahao Yuan, “The Illusion of the Grand Bargain: Decoding Trump’s 2026 Beijing Summit,” Fair Observer, 2026-07-07)

33. Ryan Hass at Brookings: Trump’s Taiwan ambiguity will embolden Beijing and “elevate, not lower, the risk of confrontation.” (Ryan Hass, “Trump’s Dangerous Taiwan Gamble,” Brookings Institution, May 2026)

34. Brad Setser, CFR: China’s direct reported Treasury holdings at $693 billion (18-year low) but custodian-adjusted real exposure between $993 billion and $1.2 trillion. (Brad W. Setser, “Finding China in the U.S. TIC Data,” CFR, 2026-05-18)

35. Aberdeen Investments: “limited evidence of China actively reducing its exposure to US assets” after custodian adjustment. (Michael Langham and Mark Bell, “Is China Selling Its US Treasuries?” Aberdeen Investments, 2025-07-09)

36. Yue Xu et al.: “no evidence to prove that China weaponized the creditor’s rights” through Treasury sales. (Yue Xu, Yu Kuang, Dayu Zhai, and Danyang Zhao, “China’s Holdings of U.S. Treasury Securities: Economic Investment or Strategic Tool in Bilateral Relations?” SAGE Open, 2025-03-12)

37. MERICS / Claus Soong: China-Russia UN Security Council alignment fell from 96% in 2018 to 83% in

38. Alexander Gabuev on Russia-China pipeline stalemate: “It is the Chinese comrades who are increasingly able to dictate which projects they are interested in.” (Cited in Michael Clarke, “The Putin-Xi Summit and the Asymmetry of the China-Russia Partnership,” The Diplomat, May 2026)
39. Christopher Walker, CEPA: China and Russia share “a strategic vision: to dismantle the U.S.-led international order,” subordinating differences when strategic stakes are high. (Christopher Walker, Center for European Policy Analysis, July 2026)
40. Hawkish view: China supplies roughly 90% of Iran’s oil exports; Chinese companies are the largest exporters of restricted dual-use goods to Russia; potential Chinese vessel positioning to provide targeting data to Iran. Ilan Berman quote: “The Iran problem is not just the Iran problem.” (RFE/RL, “Growing Russia-China-Iran Axis Poses Broader Challenge, Analysts Say,” citing Nadia Schadlow, Ilan Berman, Daniel Hoffman, 2026-06-10)
41. ODNI Annual Threat Assessment, March 2026: Chinese leaders “do not currently plan to execute an invasion of Taiwan in 2027 nor do they have a fixed timeline for achieving unification.” (US Office of the Director of National Intelligence, “2026 Annual Threat Assessment,” 2026-03-16)
42. Defense Priorities expert survey: approximately 85% of US national-security experts assessed Chinese invasion as unlikely or very unlikely within five years. (Defense Priorities, “Will the U.S. Go to War Over Taiwan? Interpreting the Results of an Expert Survey,” 2025)
43. Polymarket: 4-5% probability that China invades Taiwan before end-2026. (Polymarket, “Will China Invade Taiwan by End of 2026?” market data as of July 2026)
44. CFR Preventive Priorities Survey 2026: cross-strait crisis rated at 50% probability or higher for 2026, among the three highest-priority preventive concerns; conducted November 2025 with 620 foreign policy experts. (Paul B. Stares, CFR, “Conflicts to Watch in 2026,” January 2026)

# Chapter 8: Russia Enters on Iran's Side

1. Russia cannot allow Iran to fall; Russia and Iran are both fighting to bring God back to humanity. (Jiang Xueqin, "Geo-Strategy Update #6: Is Putin the Ubermensch," YouTube, 2025-07-18)

2. Iran as center of Russia's north-south corridor; Caspian Sea as direct waterway; American encirclement through Azerbaijan, Turkmenistan, Uzbekistan if Iran falls. (Jiang Xueqin, "Professor Jiang: World War 3 Is About To Begin, Let Me Explain!" YouTube, 2026-05-07)

3. Russia cannot allow Iran to fall because if Iran falls, they'll come after Russia next. (Jiang Xueqin, "Game Theory #9: The US-Iran War," YouTube, 2026-03-03)

4. Caspian resupply as the first operational mechanism of Russian intervention. (Jiang Xueqin, "Professor Jiang: World War 3 Is About To Begin, Let Me Explain!" YouTube, 2026-05-07)

5. Russia could bring China into the war via Belt and Road railway system to reinforce Tehran from the east. (Jiang Xueqin, "Professor Jiang: World War 3 Is About To Begin, Let Me Explain!" YouTube, 2026-05-07)

6. Putin pledges mutual nuclear non-use; any nuclear use by any party met with Russian nuclear response. (Jiang Xueqin, "Geo-Strategy #8: The Iran Trap," YouTube, 2024-05-29)

7. Araghchi's personal reception by Putin, who expressed admiration for Iran's determination, as a confirming signal of Russian commitment. (Jiang Xueqin, "Professor Jiang: World War 3 Is About To Begin, Let Me Explain!" YouTube, 2026-05-07)

8. US senator stated the Trump administration knew Russia was already involved in aiding Iran. (Jiang Xueqin, "Game Theory #12: The Law of Eschatological Convergence," YouTube, 2026-03-12)

9. Evolution of Jiang's epistemic register from speculative hypothesis in July 2025 to asserted grand strategy in May

10. Russia provided satellite targeting data to Iran; Russian tradition of providing aid and intel to anyone shooting at the United States for 30 years. (Peter Zeihan, “Russia Draws American Blood in Iran,” Zeihan on Geopolitics, 2026-04-07)
11. Ukraine disabled two Caspian vessels in December 2025 carrying military cargo from Iran to Russia. (Peter Zeihan, “Ukraine Hits the Caspian and Europe Goes Nuclear,” Zeihan on Geopolitics, 2025-12-23)
12. China most dependent on Persian Gulf energy flows; US could start clock on Chinese collapse by interdicting Chinese vessels. (Peter Zeihan, “The Iran War: China’s Discrete Supply Route,” Zeihan on Geopolitics, 2026-03-07)
13. No Zeihan statement on Russia extending nuclear deterrence to Iran found in any source examined. (Peter Zeihan, “The End of the World is Just the Beginning,” Portfolio/Penguin, 2022)
14. Russia and Iran in zero-sum competition for the Caucasus; neither can have the buffer simultaneously. (Peter Zeihan, “The Accidental Superpower,” Twelve Books, 2014)
15. Ukrainian drone strikes eliminated 1.5 to 2 million barrels per day of Russian Baltic oil export revenue. (Peter Zeihan, “Winners and Losers of the Iran War: Ukraine and Russia,” Zeihan on Geopolitics, 2026-04-13)
16. Iran war ends inconclusively for all parties; Russia’s strategic position damaged by involvement. (Peter Zeihan, “Why Nobody Came to Help the U.S. in Iran,” Zeihan on Geopolitics, 2026-07-14)
17. Russia-Iran January 2025 treaty is bureaucratic PR with no mutual defense clause; Kremlin remains unwilling to defend Iran from US or Israeli attack. (Nikita Smagin, Carnegie Endowment for International Peace, “New Russia-Iran Treaty Reveals the Limits of Their Partnership,” 2025-01-21)
18. Strategic transactionalism: Russia-Iran partnership is pragmatic and interest-driven with no mutual defense commitment and no nuclear umbrella arrangement. (Hamidreza Azizi, Middle East Council on Global

Affairs, “Strategic Transactionalism: The Iran-Russia Partnership,” 2025-06-05)

19. Putin offered bland verbal condemnations; treaty notably lacks mutual-defense clause; Moscow hopes Iran conflict continues distracting Washington from Ukraine. (Anna Borshchevskaya and Grant Rumley, Washington Institute for Near East Policy, “Great Power Spillover from the Iran War,” 2026-03-06)

20. Moscow prioritizing American Ukraine mediation over Iran commitment; risks of direct military action too high; Iranian contacts expressed frustration with Russian restraint. (Andrey Kortunov, quoted in Al Jazeera, “Where Are Iran’s Allies? Why Moscow, Beijing Are Keeping Their Distance,” 2026-03-05)

21. Russia failed Assad, Maduro, and Armenia; an alliance with Moscow counts for little when a regime faces its greatest threat. (Casey Michel, The Moscow Times, “Russia Is Failing Its Allies When It Matters Most,” 2026-03-17)

22. Russia sustained approximately 35,000 casualties monthly by April 2026 for minimal Ukraine gains; structurally incapable of second military front. (Fiona Hill, Brookings Institution, “Ukraine, Iran, and the Strains on Russian and American Power,” 2026-06-08)

23. Russia providing satellite imagery, drone design improvements via Alabuga facility, and swarm operational signatures in Iranian operations; sophisticated toolkit without direct engagement. (Nicole Grajewski and others, Radio Free Europe / Radio Liberty, “Russian, Chinese Lifelines Keeping Tehran’s Military Reconstruction Alive, Experts Warn,” 2026-04-24)

24. Caspian corridor confirmed operational; Russia routing UAV components and satellite intelligence to Iran via Bandar Anzali; Israel struck port in March 2026; traffic rebounded. (Kyiv Post, “Caspian Sea Emerges as Strategic ‘Blind Spot’ for Russia-Iran Military Logistics,” 2026-05-10; Basil

Germond, Lancaster University, The Conversation, “Why the Caspian Sea Has Become So Important in Both the Ukraine and Iran Wars,” 2026)

25. Russian nuclear umbrella over Iran rated unlikely under current conditions; could become plausible if West-Russia relations deteriorate further and cooperation develops genuine strategic defense component. (Arkady Mil-Man and Dmitry Kovchegin, INSS, “Iran-Russia Nuclear Cooperation,” March 2025; INSS Insight No. 2157, “Russia and the Iranian Nuclear Program: Support, Mediation, and Ambiguity,” 2026-06-18)

26. China invested only $9 billion in Iran over ten years against $400 billion pledged; nothing since 2018; refuses to supply game-changing hardware. (Farzin Nadimi, Washington Institute for Near East Policy, “Iran’s Failing Eastward Pivot? The Limits and Risks of Russia-China Alignment,” 2025-12-30)

27. Iran’s parliament speaker called for formal alliance; China subtly rejected the proposal. (John Feng, Newsweek, “China Says No to New Alliance with Iran,” 2026-06-18)

28. China and Russia helped Iran since the war broke out but that help has supported Iranian policy rather than shaping it. (Jon Alterman, Newsweek, “China and Russia Will Have Their Say in Who Wins a US-Iran Endurance Match,” 2026-06-14)

# Chapter 9: This Becomes World War III

1. Jiang Xueqin, “Professor Jiang: World War 3 Is About To Begin, Let Me Explain!,” Diary of a CEO, 2026-05-07, timestamp approximately 31:00.

2. Jiang Xueqin on Iran’s IRGC Mosaic strategy and ceasefire talks as theater. Jiang Xueqin, “Professor Jiang: World War 3 Is About To Begin, Let Me Explain!,” Diary of a CEO, 2026-05-07; Jiang Xueqin, “Game Theory #9: The US-Iran War,” 2026-03-03.

3. Jiang Xueqin on the irreconcilability of four grand strategies. Jiang Xueqin, “Game Theory #23: The WWIII Chessboard,” 2026-05-07; Jiang Xueqin,

"Professor Jiang: World War 3 Is About To Begin, Let Me Explain!," Diary of a CEO, 2026-05-07.

4. Shahed drone cost $35,000-$50,000 vs. THAAD intercept cost $1,000,000. Jiang Xueqin, "Game Theory #9: The US-Iran War," 2026-03-03.
5. Putin-Araghchi meeting; Xi-Putin joint statement on multipolar world and opposition to unilateralism, May
6. Jiang Xueqin on ground invasion triggering draft and domestic breakdown. Jiang Xueqin, "Geo-Strategy Update #2: WWIII Begins, Let's Game Theory," 2025-06-22; Jiang Xueqin, "Geo-Strategy Update: US-Iran War Incoming," 2025-06-18.
7. China's role: Jiang on discounting China in June 2025 vs. Belt and Road escalation pathway in May
8. Peter Zeihan, *The Accidental Superpower*, Twelve, 2014.
9. Venezuela surrender January 3, 2026; Strait of Hormuz at 20% of world oil supply. Jiang Xueqin, "Professor Jiang: World War 3 Is About To Begin, Let Me Explain!," Diary of a CEO, 2026-05-07; Jiang Xueqin, "Game Theory #9: The US-Iran War," 2026-03-03.
10. Oil refinery fires in approximately 45 countries across 45 days, April-May 2026; Jiang's acknowledgment that responsibility is unattributed. Jiang Xueqin, "Game Theory #21: World War Trump," 2026-04-21.
11. Peter Zeihan, *The Accidental Superpower: The Next Generation of American Preeminence and the Coming Global Disorder*, Twelve, 2014.
12. Peter Zeihan, *The End of the World Is Just the Beginning: Mapping the Collapse of Globalization*, Harper Business, 2022.
13. China deterred by Persian Gulf energy dependency; 80% crude import rate, 75% from Persian Gulf. Peter Zeihan, "Is Now a Good Time for China to Invade Taiwan?," Zeihan on Geopolitics, 2026-05-21.

14. Russia provided satellite targeting data enabling Iran strike on Prince Sultan Air Base; intelligence war framing. Peter Zeihan, “Russia Draws American Blood in Iran,” Zeihan on Geopolitics, 2026-04-07.

15. No allies joined the US in the Iran war; structural reasons analyzed. Peter Zeihan, “Why Nobody Came to Help the U.S. in Iran,” Zeihan on Geopolitics, 2026-07-14.

16. Iran charging $2 million per vessel to transit Strait of Hormuz under notional ceasefire; described as “ongoing catastrophic economic and strategic event.” Peter Zeihan, “Status Update on the Persian Gulf,” Zeihan on Geopolitics, 2026-07-07.

17. WTO collapse as more consequential structural change than the Iran war itself; “30 to 40 years for everything to settle.” Peter Zeihan, “The End of the WTO,” Zeihan on Geopolitics, 2026-04-10.

18. Doomsday Clock set at 85 seconds to midnight, January 2026; three simultaneous nuclear-power conflicts cited. Bulletin of Atomic Scientists, “2026 Doomsday Clock Statement,” Science and Security Board, 2026-01-28.

19. Interstate armed conflicts doubled from 3 in 2024 to 6 in 2025; nuclear-weapon reliance increasing. SIPRI, “Increasing focus on nuclear weapons amid heightened escalation risks,” SIPRI Yearbook 2026 press release, June 2026.

20. RAND panel March 2026: Russia overextended; China prefers economic tools; North Korea transactional; overall low probability of WWIII-type escalation. RAND Corporation, “War in Iran: Q&A with RAND Experts,” Maria Snegovaya, Brian Hart, Victor Cha, March 2026.

21. Russia and China as “fair-weather partners” to Iran; Russia gaining $45-151 billion additional 2026 revenue from oil prices; no significant direct intervention risk. Peterson Institute for International Economics, “How Russia and China are winning the war in Iran,” May 2026.

22. Atlantic Council four-scenario analysis; modal outcome “uneasy, inconclusive peace”; Scenario 4 as conditional non-modal danger; MOU signed June 17, 2026 collapsed July 8,

23. War3.ai WWIII probability estimate of 9.18% as of July 16, 2026; Iran-Israel escalation as largest single driver at 2.79 percentage points. War3.ai, “World War III Probability,” live model accessed 2026-07-16.

24. OrreryX composite index 61/100 as structural indicator, not probability; analysts’ derived estimate of 5-15% decade-long conflict probability. OrreryX, “World War 3 Probability 2026,” accessed April-July 2026.

25. Metaculus NATO-Russia war estimate 3-5% per year; great-power war before 2050 revised to approximately 20-25% post-Ukraine invasion. Metaculus, “When will be the next ‘Great Power’ war?,” community forecast.

26. 80,000 Hours estimate of approximately 30% great-power war probability before 2050; naive historical base rate adjusted downward for nuclear deterrence and economic interdependence. 80,000 Hours, “Great power conflict problem profile,” last updated 2025-2026.

27. Chatham House on great powers calibrating involvement rather than committing to escalation; nuclear proliferation as primary downstream risk. Chatham House, “The Iran war risks triggering a new wave of nuclear proliferation,” March 2026; Chatham House, “Iran and the new Persian Gulf equilibrium,” June 2026.

28. Doomsday Clock at 85 seconds; SIPRI interstate conflicts doubled; War3.ai at historically high reading. See endnotes 18, 19, 23.

29. OrreryX 5-15% decade estimate; War3.ai 9.18% at twelve months. See endnotes 23, 24.

30. RAND panel on Russia overextension and China energy dependency deterrence; Peterson Institute on Russia’s financial incentive for restraint. See endnotes 20, 21.

31. Atlantic Council on inconclusive endings to conflicts of this magnitude; MOU collapse July 8,

# Chapter 10: Russia Takes Odessa

1. Russia's strategic endpoint in Ukraine as Odessa, including the Black Sea access reasoning and the "last piece to this puzzle" framing. (Jiang, "Professor Jiang World War 3 Is About To Begin, Let Me Explain!," video, 2026-05-07)

2. Russia-Ukraine one-third of world carbohydrate exports claim and Africa starvation leverage framing. (Jiang, "Professor Jiang World War 3 Is About To Begin, Let Me Explain!," video, 2026-05-07; Jiang, "Game Theory #18: Trump World Order," video, 2026-04-02)

3. NATO last stand at Odessa prediction, including France, Britain, Romania, Poland, Turkey reinforcement and European political collapse scenario. (Jiang, "Geo-Strategy Update #6: Is Putin the Ubermensch," video, 2025-07-18; Jiang, "Geo-Strategy Update #7: When Eschatologies Converge," video, 2025-08-01)

4. Paisios of Mount Athos prophecy, Third Rome / Dugin framework, and Byzantine restoration scenario. (Jiang, "Geo-Strategy Update #6," video, 2025-07-18; Jiang, "Geo-Strategy Update #7," video, 2025-08-01; Alexander Dugin, "Foundations of Geopolitics," 1997)

5. Russian Black Sea Fleet evacuation from Crimea after Syria's fall, Montreux Convention blocking return. (Peter Zeihan, "The Russian Navy Leaves Syria for Benghazi," video, 2024-12-31; Peter Zeihan, "Will Ukraine Make a Play on Crimea," video, 2026-06-22)

6. Crimea effectively isolated: fuel sales suspended, Kerch bridge handling only light civilian traffic, Russian southern position deteriorating. (Peter Zeihan, "Ukraine Starts Cracking Open the Occupied Territories," video, 2026-06-30)

7. Voronezh semiconductor facility struck June 2026; Russia producing replacement military gear at one-fifth to one-twentieth the rate of consumption. (Peter Zeihan, “Russia Gets Knocked Off Its Horse,” video, 2026-07-01)

8. Ukraine producing 13 drones per 10 Russia produces; memory drone technology; Russian front “breaking down.” (Peter Zeihan, “The Future of Drone Tech: Ukraine’s Innovation,” video, 2026-07-15)

9. Southern Ukraine as “arguably the most productive part of the Russian wheat belt”; Russia’s grain leverage as deglobalization dynamic, not battlefield conquest. (Peter Zeihan, “The End of the World is Just the Beginning,” 2022)

10. Trump 28-point peace plan “probably unworkable”; peace talks “going nowhere”; Putin’s demands requiring dissolution of Ukrainian armed forces. (Peter Zeihan, “Trump’s 28-Point Peace Plan to End the Ukraine War,” video, 2025-12-02; Peter Zeihan, “Ukraine War Peace Talks,” video, 2025-12-24)

11. Russia failed to complete offensive objectives for Mykolaiv and Odessa oblasts; unable to restore operational maneuver. (ISW / Critical Threats Project, “Russian Offensive Campaign Assessment, April 8, 2026,” April 8, 2026)

12. Russia gained only 7.87% of the territory in December 2025 to May 2026 that it had gained in the equivalent prior-year period. (ISW / Critical Threats Project, “Russian Offensive Campaign Assessment, June 1, 2026,” June 1, 2026)

13. Gerasimov map confirming Odessa as Russian aspiration; CSIS assessment that it remains a long-range aspiration, not a near-term plan. (Max Bergmann and Maria Snegovaya, CSIS, “Russia’s War in Ukraine: The Next Chapter,” September 30, 2025)

14. Russia’s Black Sea Fleet has lost approximately 30% of its vessels to Ukrainian drone and missile strikes; fleet rarely leaves Novorossiysk. (H. I.

Sutton, Naval News, "Russia's Massive Black Sea Problem Is Worse Than It Looks," April 9, 2026)

15. Syrskyi confirmed Russia's 2025 plans included reaching Odessa to "cut us off from the sea entirely" and that Ukraine "thwarted these plans"; Black Sea Fleet "practically neutralized." (Commander Syrskyi, end-of-year 2025 statement, via Odessa Journal, late 2025 / early 2026)

16. Clark argues Odessa is Russia's "true strategic goal" and its capture would mean "the end of the war and a de facto victory." (General Wesley Clark, commentary via Espreso TV, April 19, 2025)

17. GLOBSEC seven-scenario exercise: 75% probability for military-continuation scenarios versus 25% for peace scenarios; no Odessa-capture scenario identified as war-termination trigger. (GLOBSEC, "Seven Security Scenarios on Russian War in Ukraine for 2026-2027," May 2026)

18. Carnegie assessment that Putin's real objective is political subjugation of Ukraine, not a specific territorial gain; no near-term war termination expected. (Alexander Baunov, Carnegie Endowment for International Peace, "Can the Disparate Threads of Ukraine Peace Talks Be Woven Together?" February 2026)

19. Polymarket ceasefire-before-2027 contract priced at approximately 25.5%, $14.5 million trading volume; Metaculus community probability approximately 40%, 138 forecasters. (Polymarket, Russia x Ukraine Ceasefire by End of 2026, resolved December 31, 2026; Metaculus community, Russia-Ukraine Ceasefire in 2026, accessed July 2026)

20. Ukraine approximately 10% of global wheat exports, 12% of corn exports, approximately 27% of sunflower oil output (pre-war). (FAO, "The Importance of Ukraine and the Russian Federation for Global Agricultural Markets," information note, July 2023)

21. Ukraine ranked ninth globally in wheat production as of

22. Ukraine’s unilateral Black Sea corridor moved 162 million tonnes of cargo across 55 countries after Russia terminated the UN Black Sea Grain Initiative in July

23. Russia’s attack strategy against Odessa is primarily aerial and maritime against port and energy infrastructure, not preparation for ground assault. (Al Jazeera, “Why Is Russia Escalating Attacks on Ukraine’s Odesa?” December 23, 2025)

24. Black Sea Grain Initiative moved 33 million tonnes in its single operational year; more than 400 million people depended on Ukrainian foodstuffs before the invasion. (UNCTAD, “The Black Sea Grain Initiative: What It Is, and Why It’s Important for the World,” 2022)

# Chapter 11: Greater Israel

1. Jiang’s CENTCOM-transfer claim appears in identical or near-identical form across six episodes dated 2025-06-22 through 2026-05-07. (Jiang Xueqin, “Geo-Strategy Update #2: WWIII Begins, Let’s Game Theory,” 2025-06-22; “Game Theory #12: The Law of Eschatological Convergence,” 2026-03-12; “Professor Jiang World War 3 Is About To Begin, Let Me Explain!” 2026-05-07)

2. Israel as “de facto hegemon” through absorbed American military. (Jiang Xueqin, “Geo-Strategy Update #2: WWIII Begins, Let’s Game Theory,” 2025-06-22)

3. The biblical covenant from the Nile to the Euphrates as Israel’s operating grand strategy. (Jiang Xueqin, “Game Theory #11: The Law of Escalation,” 2026-03-10; “Professor Jiang World War 3 Is About To Begin, Let Me Explain!” 2026-05-07)

4. American bases as the primary obstacle to the Greater Israel Project. (Jiang Xueqin, “Game Theory #16: Pax Judaica Rising,” 2026-03-26)

5. Jiang's account of Israel using the Iran war to destroy American power in the region. (Jiang Xueqin, "Game Theory #16: Pax Judaica Rising," 2026-03-26)
6. GCC economic collapse as intentional. (Jiang Xueqin, "Game Theory #12: The Law of Eschatological Convergence," 2026-03-12)
7. "After Iran, Turkey is next." (Jiang Xueqin, "Professor Jiang World War 3 Is About To Begin, Let Me Explain!" 2026-05-07)
8. Pax Judaica as AI surveillance trade network headquartered in Jerusalem; tech company relocation. (Jiang Xueqin, "Game Theory #16: Pax Judaica Rising," 2026-03-26; "Secret History #END: Pax Judaica," 2025-12-18)
9. Israeli flag blue lines as encoding Nile-to-Euphrates claim. (Jiang Xueqin, "Secret History #END: Pax Judaica," 2025-12-18)
10. IDF insignia cited as evidence of the Greater Israel map. (Jiang Xueqin, "Secret History #END: Pax Judaica," 2025-12-18)
11. Al-Aqsa destruction as Jiang's stated falsification test. (Jiang Xueqin, "Game Theory #12: The Law of Eschatological Convergence," 2026-03-12)
12. Zeihan does not address CENTCOM transfer to Israel in any sourced book or video. (Peter Zeihan, *The End of the World Is Just the Beginning*, 2022; *The Accidental Superpower*, 2014; "Why Nobody Came to Help the US in Iran," 2026-07-14)
13. Turkey as Eastern Mediterranean master extracting concessions from Israel. (Peter Zeihan, *The End of the World Is Just the Beginning*, Harper Business, 2022, p. 315)
14. Turkey listed as a "rising star" in post-American world. (Peter Zeihan, *The Accidental Superpower*, Grand Central Publishing, 2014, p. 68)
15. Israel structurally dependent, cannot look after its own security; must find a partner. (Peter Zeihan, "What's Up In the Middle East: Israel's Future," 2025-06-04)

16. Turkey’s GDP, industrial base, and military as the largest in the region; second-largest NATO army. (Peter Zeihan, “What’s Up with the Middle East: Turkish Dominance,” 2025-06-05)

17. Netanyahu as dependent actor leveraging US power, not independent regional hegemon. (Peter Zeihan, “Why Nobody Came to Help the US in Iran,” 2026-07-14)

18. Israel’s shift to “dominance, degradation, and debilitation” doctrine; war as the arrangement itself. (Nathan J. Brown, Carnegie Endowment for International Peace, “Israel’s Forever Wars,” 2026-03-16)

19. Israel seeks broader effort to impose hegemony; failed states as buffers. (Ali Bakir, Gulf International Forum, “Three Calculations, One War,” 2026-03-08)

20. India-Middle East-Europe corridor as complement to Israeli military campaigns; counter to China’s Belt and Road. (Ibrahim Ozturk, European Centre for Populism Studies, “Power Transition in the Middle East,” 2026-03-15)

21. Yadlin and Golov “Three Seas Order”: US as “only credible external security provider.” (Amos Yadlin and Avner Golov, Foreign Affairs, “A Three Seas Order for the Post-Iran Middle East,” May/June 2026)

22. Approximately 50,000 US troops remain in theater; no drawdown ordered as of mid-June 2026.

23. CENTCOM evaluating relocating from Bahrain, Kuwait, Saudi Arabia to Israel; Bahrain base sustained approximately $400 million in damage; new US base in Negev under consideration. (Hadar Katsman, Jerusalem Post, “US evaluates moving CENTCOM forces and naval assets to Israel after Iran war,” 2026-07-02)

24. Former CENTCOM Commander Gen. Frank McKenzie endorses moving US assets to Israel to counter Iran. (Matthew Shea, Jewish Insider, “Former

CENTCOM chief backs basing US assets in Israel to counter Iran," 2026-06-29)

25. Israel as "regional operational partner" in CENTCOM, not successor; five years of integration documented. (Yanir Kapach, INSS, "Five Years Since Israel's Transfer to CENTCOM," 2026-01-18)

26. US 2026 National Defense Strategy designates Israel "model ally"; shifts burden-sharing but maintains US primacy. (Levente Bartha, Atlas Institute for International Affairs, "The 2026 National Defense Strategy: Decoding the Pentagon's Priorities," 2026-02-19)

27. Nagel Commission: Turkish military expansion in Syria "liable to deepen direct danger of Turkish-Israeli hostilities." (All Israel News staff, "Nagel Commission warns Israel of possible war with Turkey," 2025-01-07)

28. Israel-Turkey competition as "long-term strategic contest"; Trump administration weighing Turkey's regional role. (Yoni Ben Menachem, Jerusalem Center for Security and Foreign Affairs, "Israel and Turkey Compete for Regional Hegemony," 2026-07-14)

29. Kaan fighter and Kizilelma drone still in development; only three Altay tanks in service; F-16 fleet lacks upgrades; deconfliction hotline established. (Ryan Gingeras, War on the Rocks, "Ankara's Crossroads: Rearmament, Risk, and the Prospect of War with Israel," 2026-05-11)

30. Turkey reemerging as Middle East actor but not neo-Ottoman power; economic fragility and NATO dependence as constraints. (Asli Aydintasbas, Brookings Institution, "Turkey's search for a Middle East order," 2026-06-16)

31. Yinon strategy and hexagon of alliances as governance structure for territorial expansion mapping onto Nile-to-Euphrates vision. (Jwan Zreiq, Africa Is A Country, "Greater Israel and the new regional order," 2026-03-23)

32. Former Israeli ambassador Alon Pinkas: Turkey-as-Iran comparison is “ridiculous”; Turkey has never denied Israel’s right to exist. (Jasim Al-Azzawi, Middle East Monitor, “The next Iran? Why Israel’s Turkey anxiety is becoming doctrine,” 2026-06-21)

# Chapter 12: East Asia Ignites

1. China will attempt to take Taiwan; Japan will resist militarily to protect sea lanes. (Jiang Xueqin, “Professor Jiang World War 3 Is About To Begin, Let Me Explain!,” Diary of a CEO interview, 2026-05-07)

2. Japanese PM Sanae Takaichi stated that “Taiwan is core to Japanese strategic interests.” (Jiang Xueqin, “Professor Jiang World War 3 Is About To Begin, Let Me Explain!,” Diary of a CEO interview, 2026-05-07)

3. Jiang predicts Trump may declare support for Taiwan-China reunification, transferring deterrence burden to Japan and South Korea. (Jiang Xueqin, “Professor Jiang World War 3 Is About To Begin, Let Me Explain!,” Diary of a CEO interview, 2026-05-07)

4. Jiang states that a Chinese military invasion of Taiwan would falsify his model; he considers it essentially impossible. (Jiang Xueqin, “Substack Founding Members Livestream #2,” 2026-07-11)

5. The US will use naval carriers to blockade the Strait of Malacca, cutting off 80 to 90 percent of China’s energy and trade. (Jiang Xueqin, “Professor Jiang World War 3 Is About To Begin, Let Me Explain!,” Diary of a CEO interview, 2026-05-07)

6. The US National Defense Strategy programs four strategic goals, including economic strangulation of China via chokepoints. (Jiang Xueqin, “Game Theory #18: Trump World Order,” 2026-04-02)

7. The US has signed a military cooperation agreement with Indonesia over the Strait of Malacca. (Jiang Xueqin, “Professor Jiang World War 3 Is About To Begin, Let Me Explain!,” Diary of a CEO interview, 2026-05-07)

8. Jiang identifies the North Korea-Seoul flashpoint as “most surprising but actually the most pressing.” (Jiang Xueqin, “Professor Jiang World War 3 Is About To Begin, Let Me Explain!,” Diary of a CEO interview, 2026-05-07)
9. The THAAD missile-defense system was removed from South Korea to the Middle East for the Iran war. (Jiang Xueqin, “Professor Jiang World War 3 Is About To Begin, Let Me Explain!,” Diary of a CEO interview, 2026-05-07)
10. North Korea sent 10,000 troops to Ukraine. (Jiang Xueqin, “Game Theory #27: Putin Enters the Chat,” 2026-05-21)
11. Putin signed a mutual defense pact with Kim Jong-un in June 2024; any US attack on North Korea triggers Russian defense obligation. (Jiang Xueqin, “Game Theory #27: Putin Enters the Chat,” 2026-05-21)
12. North Korea GDP per capita approximately $771; South Korea approximately $33,000. (Jiang Xueqin, “Game Theory #27: Putin Enters the Chat,” 2026-05-21)
13. North Korea fertility rate 1.81; South Korea 0.81. (Jiang Xueqin, “Game Theory #27: Putin Enters the Chat,” 2026-05-21)
14. North Korea’s preferred move is extortion under the threat of artillery; “All North Korea has to do is tell the Koreans, ‘You either pay us a lot of money or we’ll go attack you.’” (Jiang Xueqin, “Game Theory #27: Putin Enters the Chat,” 2026-05-21)
15. Xi Jinping’s first visit to North Korea since 2019 interpreted as activating North Korea as a proxy against Japan’s remilitarization. (Jiang Xueqin, “Substack Live #1: Welcome to Boomer Hell,” 2026-06-13)
16. China imports roughly 80 percent of its energy, with approximately 75 percent from the Persian Gulf transiting the Indian Ocean and Malacca. (Peter Zeihan, “Taking Naval Options Away from China,” video, 2026-05-26)
17. A Chinese attack on Taiwan would be “the end of China as an entity” and “the end of the Han ethnicity because of energy shortages and famine.”

(Peter Zeihan, “What Would a Conflict in Taiwan Look Like?,” video, 2025-12-16)

18. If China moved on Taiwan, the US would “shut off energy flows to China and within a year China would fall into a post-apocalyptic wasteland complete with famine that kills half of their population.” (Peter Zeihan, “Is Now a Good Time for China to Invade Taiwan?,” video, 2026-05-21)
19. Truck-mounted anti-ship missiles, Typhon and Japanese Type-88, were deployed throughout the Philippines by May
20. Japan’s weapons export liberalization passed in May 2026; Japan’s second-largest navy is beginning to operate beyond home island waters. (Peter Zeihan, “Japanese Weapons Are Open for Export,” video, 2026-05-05)
21. US submarine basing at HMAS Stirling near Perth, announced February 2026, is designed to interdict Chinese Indian Ocean and Malacca shipping in a hot war. (Peter Zeihan, “The U.S. Navy Goes Down Under,” video, 2026-02-18)
22. The Southeast Asian route through Malacca is expected to hold “unless things go really horribly bad” externally. (Peter Zeihan, “Say Goodbye to the World’s Trade Routes,” video, 2025-10-06)
23. North Korea is no longer a Chinese puppet; Kim has aligned with Russia in exchange for ICBM technology and now plays Beijing and Moscow against each other. (Peter Zeihan, “China No Longer Controls North Korea,” video, 2026-06-16)
24. North Korea has 10,000 to 15,000 artillery emplacements within range of Seoul; “there simply is no conventional or even nuclear solution to that.” (Peter Zeihan, “South Korea Goes All-In on Drones,” video, 2026-07-16)
25. The US-South Korea nuclear submarine deal of December 2025 effectively sponsors South Korea’s de facto nuclear weapons program; once one of Japan, Taiwan, or South Korea acquires nuclear-armed submarines, the

others will follow. (Peter Zeihan, “South Korea and the US Make a Nuclear Deal,” video, 2025-12-03)

26. CFR rates a severe Taiwan Strait crisis as Tier I risk for 2026: moderate likelihood, high impact, “the most dangerous flashpoint in the world today.” (Paul B. Stares and David Sacks, “The Next Taiwan Crisis Won’t Be Like the Last,” Council on Foreign Relations, 2025-12)

27. ASPI concludes that a Chinese attempt to blockade or invade Taiwan in 2026 is unlikely, citing PLA purges, US arms transfers, coalition-building, Taiwan’s $40 billion defense plan, and China’s economic fragility. (Joe Keary, “Xi’s Taiwan Scorecard: Why 2026 Is Not the Year,” The Strategist, Australian Strategic Policy Institute, 2026-01-14)

28. China is “losing its ability as well as a sense of immediacy to attack Taiwan”; the CMC has been reduced to two members as of January

29. Polymarket prices the probability of China invading Taiwan by end of 2026 at 4 percent, with $38.6 million in trading volume. (Polymarket, “Will China Invade Taiwan by End of 2026?,” market data as of June 2026)

30. Metaculus community forecasters put the probability of China attacking or blockading Taiwan during 2026 at 10 percent, across 830 forecasters. (Metaculus, “Will China Attack or Blockade Taiwan During 2026?,” mid-2026)

31. International Crisis Group rates a Taiwan Strait crisis in 2026 at roughly 50 percent probability, defined broadly to include gray-zone escalation and miscalculation. (International Crisis Group, current assessment, 2026)

32. The Malacca Strait handles $2.4 trillion in annual goods, 21 percent of global maritime trade. (Brian Hart, Matthew Funaiole, et al., “Troubled Straits: Analyzing Trade Chokepoints in the South China Sea,” CSIS, 2026-07-01)

33. China imports over 11 million barrels of oil per day, roughly four-fifths transiting Malacca; overland Belt and Road alternatives cannot substitute at

commercial scale. (Scott N. Romaniuk, Laszlo Csicsmann, and Amparo Pamela Fabe, “China and Maritime Chokepoints: Hormuz, Malacca, and Indo-Pacific Vulnerability,” The Diplomat, 2026-05-29)

34. Malacca Strait handled over 102,500 vessel transits in 2025; piracy surged 74 percent to 108 incidents, a 19-year high. (S&P Global Market Intelligence, “Maritime Chokepoints Tighten, Global Supply Chain Risk Rises,” 2026-04)
35. North Korea announced deployment of new 155mm self-propelled gun-howitzers with range exceeding 60 kilometers, sufficient to strike central Seoul. (NPR, “North Korea Says It Will Deploy New Artillery Guns Targeting Seoul,” 2026-05-08)
36. Monte Carlo simulations of North Korean artillery bombardment of Seoul produce realistic civilian fatality estimates of approximately 2,600 to 2,961, roughly 1 to 3 percent of commonly cited estimates, owing to shelter capacity and counter-battery response. (Nicholas D. Anderson and Daryl G. Press, “Lost Seoul? Assessing Pyongyang’s Other Deterrent,” Texas National Security Review, 2025-06-09)
37. South Korea’s fixed-site ballistic missile deployments create a first-mover dilemma that could incentivize North Korean preemption, making Seoul bombardment more likely even without an opportunistic intent. (Decker Eveleth and Jeffrey Lewis, reported in Korea Times, “Why Some Experts Fear S. Korean Missile Sites Could Incentivize N. Korean Strikes,” 2026-06-02)
38. CFR finds that most wargame simulations fail to model simultaneous contingencies and calls this a “critical analytical gap.” (Paul B. Stares and David Sacks, “The Next Taiwan Crisis Won’t Be Like the Last,” Council on Foreign Relations, 2025-12)
39. 20 to 40 percent redeployment of USFK to a Taiwan theater creates a window North Korea “is likely to exploit”; “sequential conflicts are manageable; simultaneous ones are catastrophic.” (Andrew A. Michta, “The

Decisive Theater: North Korea and the Problem of Simultaneous War," 19FortyFive, 2026-07-06)

40. South Korea possesses sufficient standing force capability for weeks of independent defense under a dual-contingency scenario, but "self-reliance does not necessarily equal a self-sufficient victory" over sustained operations. (Ju Hyung Kim, "How South Korea Might Fight a North Korean Invasion in a Dual-Contingency Scenario," 38 North, Henry L. Stimson Center, 2026-04-23)

41. Asia's flashpoints are heating under conditions of declining American primacy and "no credible crisis management mechanisms" in the region. (Nick Bisley, "Asia's Flashpoints Are Heating Up," Toda Peace Institute, 2026-06-17)

42. North Korea has historically exploited windows of great-power distraction, citing NPT withdrawal during the 2003 Iraq War and missile launches during the Russia-Ukraine conflict peak. (Ju Hyung Kim, "South Korea Could Support Taiwan in a Dual Contingency," Global Taiwan Institute, 2025-08-13)

# Chapter 13: The AI Surveillance State

1. Jiang Xueqin stated "the world will move towards an AI surveillance state" as his single most consequential prediction. (Jiang Xueqin, "Professor Jiang World War 3 Is About To Begin, Let Me Explain!," video transcript, 2026-05-07)

2. Jiang described China's digital-ID system from firsthand residence. (Jiang Xueqin, "Professor Jiang World War 3 Is About To Begin, Let Me Explain!," video transcript, 2026-05-07)

3. Jiang predicted the digital surveillance model would pass "everywhere in the western world." (Jiang Xueqin, "Secret History #3 Death by Gerontocracy," video transcript, 2025-08-29)

4. Jiang asserted “AI by itself can’t make any money” as the opening premise for his surveillance-state inference. (Jiang Xueqin, “Game Theory #24 The AI Apocalypse,” video transcript, 2026-05-12)

5. Jiang argued data-center investment is explicable only by a surveillance-state purpose. (Jiang Xueqin, “Secret History #END Pax Judaica,” video transcript, 2025-12-18)

6. Jiang framed twenty-first-century warfare as population management requiring AI surveillance. (Jiang Xueqin, “Game Theory #22 Twilight of the Nation-State,” video transcript, 2026-04-28)

7. Trump’s Stargate data-center program was announced at $500 billion. (Jiang Xueqin, “Game Theory #21 World War Trump,” video transcript, 2026-04-21)

8. Jiang stated that a Trump third term is structurally necessary to prevent anti-war revolt via domestic surveillance. (Jiang Xueqin, “Game Theory #21 World War Trump,” video transcript, 2026-04-21)

9. Jiang coined “techno-Marxism” as the end-state in which an AI god controlled by a small elite replaces money as the governing system. (Jiang Xueqin, “Game Theory #28 Predictive History,” video transcript, 2026-05-26)

10. Jiang described microchip implants as the physical form of digital ID and digital currency, calling this “the mark of the beast.” (Jiang Xueqin, “Secret History #END Pax Judaica,” video transcript, 2025-12-18)

11. Jiang described “Pax Judaica” as an AI surveillance state / holy empire centered in Jerusalem. (Jiang Xueqin, “Game Theory #12 The Law of Eschatological Convergence,” video transcript, 2026-03-12)

12. Jiang explicitly dissented from the “fully engineered” reading of the surveillance rollout: “I don’t think it’s engineered… I think they are responding and reacting to real time crisis.” (Jiang Xueqin, “Predictive History Founding Members #1,” video transcript, 2026-06-07)

13. The contradiction between China-as-surveillance-partner and China-as-economic-warfare-target appears across the Game Theory series. (Jiang Xueqin, “Game Theory #25 Trump Visits China,” video transcript, 2026-05-14; “Game Theory #22,” 2026-04-28)

14. Zeihan’s silence on digital ID, CBDCs, AI surveillance states, and Chinese surveillance exports is confirmed against all 81 dated video files from April through July 2026 and both books. (Peter Zeihan, *The End of the World is Just the Beginning*, Harper Business, 2022; *The Accidental Superpower*, Grand Central Publishing, 2014; video archive searched April through July 2026: no relevant content found)

15. Zeihan described Chinese facial recognition surveillance as a contrast point in an agricultural technology passage. (Peter Zeihan, *The End of the World is Just the Beginning*, 2022, agricultural inputs chapter)

16. Zeihan discussed China’s declining strategic position in April and June

17. Carnegie documented Chinese company technology supplying AI surveillance in at least 63 countries, with Huawei alone present in approximately 50 nations; 51% of advanced democracies deploy AI surveillance systems. (Steve Feldstein, Carnegie Endowment for International Peace, “The Global Expansion of AI Surveillance,” September 2019)

18. Beraja, Kao, Yang, and Yuchtman found China has a comparative advantage in facial recognition AI export uniquely associated with democratic backsliding in recipient countries. (Martin Beraja, Andrew Kao, David Y. Yang, Noam Yuchtman, “Exporting the Surveillance State via Trade in AI,” Brookings Institution, 2023-01-12)

19. Freedom House documented export of Great Firewall technology to Myanmar. (Freedom House, “Freedom on the Net 2025: An Uncertain Future for the Global Internet,” November 2025)

20. The NED identified four technology tracks of Chinese data-centric authoritarianism with export dimensions. (Valentin Weber, National

Endowment for Democracy, “Data-Centric Authoritarianism,” published prior to July 2026)

21. The People’s Bank of China reported 180 million e-CNY wallets and $7.3 trillion in cumulative transaction volume as of end-2025. (Yaya J. Fanusie and Emily Jin, “The Programmable State: The e-CNY and China’s Quest for Smarter Surveillance,” Lawfare, 2025-04-17)
22. Fanusie and Jin found the e-CNY architecture enables smart contracts and enhanced tracking of financial activity. (Yaya J. Fanusie and Emily Jin, “The Programmable State: The e-CNY and China’s Quest for Smarter Surveillance,” Lawfare, 2025-04-17)
23. The IMF acknowledged CBDC may allow a “digital trail” enabling population-level financial surveillance. (International Monetary Fund, “Central Bank Digital Currency Data Use and Privacy Protection,” IMF Fintech Note 2024/004, 2024-08-30)
24. Nottingham Trent University research found authoritarian governments lead CBDC adoption for surveillance and capital-control purposes. (Nottingham Trent University, “Political Motives Behind Global Adoption of Central Bank Digital Currency Revealed in New Study,” May 2025)
25. The US House passed H.R. 1919, Anti-CBDC Surveillance State Act, by 219 to 217 in July
26. The GENIUS Act, signed July 18, 2025, explicitly prohibits the Federal Reserve from issuing a retail CBDC. (GENIUS Act, signed into law, 2025-07-18)
27. Canada rejected a mandatory national digital ID as of January 2026; Michael Geist attributed this to privacy-commissioner pressure and public concern. (Michael Geist, “Government Says There Are No Plans for National Digital ID To Access Services,” January 2026)
28. Regulation (EU) 2024/1183 (eIDAS 2.0) requires every EU member state to make a digital identity wallet available by end-2026. (European

Commission, Regulation (EU) 2024/1183, eIDAS 2.0, entered into force 2024)

29. EDRi warned in March 2026 that implementing acts were weakening eIDAS wallet surveillance safeguards. (European Digital Rights, “The eID Wallet Still Doesn’t Deserve Your Full Trust,” 2026-03-10)

30. EDRi and epicenter.works argued in June 2026 that digital euro privacy guarantees “rely too heavily on institutional assurances rather than technical enforcement.” (EDRi and epicenter.works, open letter to EU Parliament and Council, 2026-06-17)

31. The EU AI Act Article 5 prohibition on social scoring AI became enforceable February 2, 2025; the Future of Privacy Forum noted meaningful carve-outs remain. (Future of Privacy Forum, “Red Lines under the EU AI Act: Unpacking Social Scoring as a Prohibited AI Practice,” published after February 2025)

32. Greitens argued that demand rather than supply drives surveillance technology adoption and that Western legal institutions represent genuine structural barriers. (Sheena Chestnut Greitens, Brookings Institution, “Dealing with Demand for China’s Global Surveillance Exports,” April 2020)

33. Feldstein’s Carnegie index found regime type a poor predictor of surveillance adoption; Freedom House and the IMF occupy an ambiguous middle position on behavioral-control outcomes. (Steve Feldstein, Carnegie Endowment, September 2019; Freedom House, “Freedom on the Net 2025,” November 2025; IMF Fintech Note 2024/004, August 2024)

34. UK Finance reported most major Western democracies are moving toward wholesale rather than retail CBDC. (UK Finance, “Global CBDC Developments in 2025: Emerging Trends and Geostrategic Considerations,” 2025)

# Chapter 14: Collapse of the American Empire

1. US national debt stated at $37 trillion. (Jiang Xueqin, “Civilization #END, The Decline and Fall of the American Empire,” video lecture, 2025-06-12)

2. Piketty’s 2%/5% divergence between real and financial economy growth rates. (Thomas Piketty, *Capital in the Twenty-First Century*, Harvard University Press, 2014; cited in Jiang Xueqin, “Secret History #2, How Societies Collapse,” video lecture, 2025-08-22)

3. Jiang’s prediction that America was structurally compelled to attack Iran to restore petrodollar credibility. (Jiang Xueqin, “Game Theory #9, The US-Iran War,” video lecture, 2026-03-03)

4. Jiang’s Vietnam analogy and ground-invasion quagmire prediction. (Jiang Xueqin, “Game Theory #11, The Law of Escalation,” video lecture, 2026-03-10; “Geo-Strategy Update #2, WWIII Begins, Let’s Game Theory,” video lecture, 2025-06-22)

5. Turchin elite overproduction framework applied to the American collapse thesis. (Peter Turchin, *End Times*, Penguin, 2023; cited in Jiang Xueqin, “Secret History #2, How Societies Collapse,” video lecture, 2025-08-22)

6. Thucydides Peloponnesian War analogy applied to American decline. (Jiang Xueqin, “Civilization #END, The Decline and Fall of the American Empire,” video lecture, 2025-06-12)

7. Eric Cline Bronze Age Collapse systems-collapse framework. (Eric Cline, *1177 BC: The Year Civilization Collapsed*, Princeton University Press, 2014; cited in Jiang Xueqin, “Secret History #15, Capital and the Bronze Age Collapse,” video lecture, 2025-11-04)

8. Direct statement on five-to-ten-year empire collapse. (Jiang Xueqin, “Professor Jiang, World War 3 Is About To Begin, Let Me Explain!” video lecture, 2026-05-07)

9. Zeihan's foundational thesis that the US largely escapes the carnage. (Peter Zeihan, *The End of the World is Just the Beginning*, Harper Business, 2022, Introduction)

10. US T-bill as global baseline at $36 trillion. (Peter Zeihan, "Fire Hose of Chaos: Government Debt," video, 2025-04-30)

11. Zeihan's 2030s-2040s timeline for US debt stress. (Peter Zeihan, "Moody's Downgraded the Debt, So Let's Recap," video, 2025-05-17)

12. Zeihan's characterization of the $1.8 billion DOJ settlement as a slush fund comparable to Venezuelan corruption. (Peter Zeihan, "The U.S. Gets a Taste of Corruption," video, 2026-05-27)

13. Zeihan's "greatest collapse in strategic power" statement. (Peter Zeihan, "How to End American Power," video, 2026-04-09)

14. Zeihan applies the Bronze Age Collapse analogy to non-North American climate vulnerability. (Peter Zeihan, *The End of the World is Just the Beginning*, "Making Sense of Climate Change, Part III: Two Is Better Than One," 2022)

15. Ray Dalio's Suez-moment analysis and "past the point of no return" statement. (Ray Dalio, *Fortune*, June 26, 2026)

16. Dollar share of global reserves at 56.9%, lowest since 1995; all three major rating agencies downgraded US credit by March 2026.

17. CBO projections: interest costs $1 trillion in 2026 rising to $2.1 trillion by 2036.

18. Alfred McCoy's micro-militarism pattern: Sicilian Expedition, Portugal's Morocco crusade, Britain's Suez. (Alfred W. McCoy, Democracy Now!, March 23, 2026)

19. Turchin's 2010 Nature instability-peak forecast and 2023 End Times assessment. (Peter Turchin, *Nature*, 2010; *End Times*, Penguin, 2023)

20. IMF: “window for orderly adjustment is narrowing.” (IMF, 2026 Article IV Consultation with the United States, April 2026)

21. Patel et al. hegemonic turning-point modeling, range 2032-2067. (Patel et al., *Frontiers in Political Science*, 2025)

22. Beckley’s argument that US structural advantages have been systematically underweighted. (Michael Beckley, *Unrivaled: Why America Will Remain the World’s Sole Superpower*, Cornell University Press, 2018)

23. Roubini’s November 2025 modal scenario of “short, shallow downturn followed by strong recovery.” (Nouriel Roubini, Project Syndicate, November 26, 2025)

24. Journal of Futures Studies retrospective on Galtung: “intensification phase rather than resolution phase.” (*Journal of Futures Studies*, “Galtung Revisited,” January 29, 2026)

25. Cline’s systems-collapse framework as analytical tool for interconnected fragility. (Eric Cline, *1177 BC: The Year Civilization Collapsed*, Princeton University Press, 2014; Big Think interview, undated)

26. Qatar urea production (11% of global) and Persian Gulf ammonia (30-35% of global) knocked to zero by Hormuz closure. (Peter Zeihan, “As Fertilizer Falls, Famine Will Follow,” video, 2026-03-26)

27. Jiang’s fertilizer-carrying-capacity claim. (Jiang Xueqin, “Game Theory #22, Twilight of the Nation-State,” video lecture, 2026-04-28)

28. Sulfur prices up 57% during the US-Iran war. (Jiang Xueqin, “Game Theory #21, World War Trump,” video lecture, 2026-04-21)

29. Zeihan exempts the United States from fertilizer famine, names China and South Asia as primary victims. (Peter Zeihan, “As Fertilizer Falls, Famine Will Follow,” video, 2026-03-26)

30. WFP Global Report on Food Crises 2026: 266 million in 47 countries in acute food insecurity; 39 million at emergency-level hunger; 35.5 million

children acutely malnourished. (WFP / Global Network Against Food Crises, *Global Report on Food Crises 2026*, April 2026)

31. Sahel food insecurity tracking above 40 million, projections above 50 million for June-August 2026 lean season.

32. Urea prices surged from $350/ton to over $800/ton by March 2026.

33. FAO Food Price Index rose 2.4% month-on-month in March 2026.

34. Morocco controls approximately 70% of global phosphate reserves. (LSE Africa at LSE, "Morocco's Phosphate Diplomacy Is Reshaping Africa's Agricultural Future," June 18, 2025)

35. Alfred McCoy on the timing of the Iran operation during the spring fertilizer-shipping season. (Alfred W. McCoy, Democracy Now!, March 23, 2026)

36. Dollar rose modestly on war start, consistent with Zeihan's position against the petrodollar-collapse thesis. (Peter Zeihan, "The U.S. Dollar: Short vs. Long Term," video, 2026-03-19)