



August 31, 2025, SCO reception and concert program, group photo

Geopolitical Overview by Simon Hunt

The New World: Post Tianjin & Beijing Thoughts

Simon Hunt

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On August 31, 2025, a reception and concert program were held at the Tianjin Meijiang International Convention and Exhibition Center in honor of heads of state and government and their spouses, hosted by the General Secretary of the Chinese Communist Party, Xi Jinping, and First Lady Peng Liyuan. General Secretary of the Chinese Communist Party Xi Jinping and First Lady Peng Liyuan welcomed President of the Republic of Azerbaijan Ilham Aliyev and First Lady Mehriban Aliyeva. Afterward, the heads of state and government and their spouses posed for a group photo.



China's JL-3 submarine-launched nuclear missile seen for the first time during the 2025 Victory Day military parade in Beijing. The display marks a major milestone in the operational readiness of China's sea-based nuclear deterrent, confirming its ability to strike the U.S. mainland from protected waters. (Picture source: China Social Network)

Topical quotes

"Time and again, our exchanges on critical international issues have shown that Moscow and Beijing share broad common interests and strikingly similar views on fundamental questions. We are united in our vision of building a just, multipolar world order with a focus on the nations of the Global Majority."

PRESIDENT PUTIN, 28TH AUGUST 2025

"The West's failure to understand a simple fact that Russia, by virtue of its vast natural resources, does not need international trade to grow its economy. It is self-sufficient. But Russia is not sitting still. It has forged close economic ties with its BRICS partners and, along with those partners, is building an alternative to a Western hegemonic economic and financial system. Donald Trump is no longer in a position to take Russia as an economic hostage. Pax Americana is kaput."

LARRY JOHNSON, 9TH SEPTEMBER 2025

“The default psychological mode of the West will be defensively antagonistic. The US clearly has not been prepared psychologically to go onto any sort of equal footing with these SCO powers. Centuries of colonial superiority have shaped a culture where the only possible model is hegemony and the imposition of pro-Western dependency.”

ALASTAIR CROOKE, 8TH SEPTEMBER 2025

“If these two countries cooperate (India and China) then what happens is there is a bulwark...the US-dominated West gets balanced out and we actually move into a multipolar world.... It is an Asian century and a Eurasian century. The economic fulcrum is shifting to the Indo-Pacific and Asia-Pacific. This cooperation is good news because it will make a much more balanced world.”

DR. SHASHI ASTGANA, FORMER DIRECTOR GENERAL, INDIAN ARMY, INFANTRY, 30TH AUGUST 2025

“The formula that has gained currency in Moscow – not against the West, but without it – is finally becoming realty.”

FYODOR LUKYANOV, CHAIRMAN OF THE PRESIDUM OF THE COUNCIL ON FOREIGN AND DEFENSE POLICY, 4TH SEPTEMBER 2025

“With an intercontinental range and multiple warhead capabilities, the JL-3 positions China as a formidable rival to the United States and its allies as the balance of military power in the Indo-Pacific shifts in China’s favor.”

BRANDON J. WEICHERT, THE NATIONAL INTEREST, SEPTEMBER 2025

“Putin destabilizes large parts of our country. He is interfering everywhere, particularly on social media. So, we are already in a conflict with Russia.”

CHANCELLOR FRIEDRICH MERZ, 28TH AUGUST 2025

“The 2025 Eastern Economic Forum (EEF) held in Vladivostok has solidified itself as a geoeconomic arena where discourse turns into concrete projects – all anchored in the emerging multipolar world order. Far from being just a regional event, the EEF is increasingly asserting itself as a central instrument of Russia’s strategy to reorient its integration axis toward the Asia-Pacific region and the so-called Global South.”

LUCAS LEIROZ, STRATEGIC CULTURE FOUNDATION, 8TH
SEPTEMBER 2025.

Some Conclusions

- Equity markets are still climbing the wall of worry. The prospect of falling interest rates is greater than the onset of recession and a fractured society. The retail sector is the main buyer, institutions the sellers.
- SCO and BRICS have laid out their stalls. To America they say join us, if not we will go our own way to develop a New World to replace the Old One.
- The risk of Europe becoming more physically involved in the Ukraine war following the current Polish false flag operation and the start of large military exercises conducted under the one-in-four years Zapad treaty with Russian and Belarusian forces is very real. What then European equities?
- Equally at risk is a renewed attack on Iran by USA/Israel. Israel has been preparing for it by be stocked up with new missiles and other military equipment from America; and Iran has strengthened her defense systems with new arrivals from Russia and China. What then oil prices?
- Whether the new draft National Defense Strategy will ever be realized given the opposing powers within America is questionable, but two themes will remain or be strengthened. First, is the quest for control of global energy resources and second a focus on South and North America as the country’s backyard. From that base America can largely direct critical resources where they want.

- The Fourth Turning is the period we have entered. It will define economics and our future whether it will be a return to conservatism or continued liberalism. Charlie Kirk's assassination is part of this battle.

- Our base economic scenario may be overwhelmed by an escalation of the wars in Europe and the Middle East by year-end. For the former capital controls will create global financial instability because of the interconnectivity of banks and for the latter, what price oil?

Introduction

It is not just that more clarity has emerged from the SCO meetings in Tianjin, the bilateral discussions in Beijing and the impressive military parade but events elsewhere are moving towards an escalation of the wars in Ukraine and the Middle East and the eventual collapse of some governments in Europe if not the EU itself.

Should some of these risks play out as events they would question ours and many others economic and financial scenarios. Our central scenario is based on short-term economic slowdown until 2nd quarter 2026 if not recession in the USA and Europe (about 45% global GDP) followed by two years of inflation driven recovery.

China Meetings

The clear message was that the majority of the world are building a multilateral world to replace the world dominated by America for the last 80 years. „We the BRICS, SCO and the Deep South have built our platforms for trade, finance and security, food and resources etc. We invite you to join the multilateral world. If you prefer not to do so we respect that decision, but we will continue developing the world that should exist post the colonial years.“



In this combination photograph, Russian President Vladimir Putin, left, Indian Prime Minister Narendra Modi, centre, and Chinese President Xi Jinping talk ahead of the Shanghai Cooperation Organization (SCO) summit at the Meijiang Convention and Exhibition Center in Tianjin, China, Monday, Sept. 1, 2025. (Indian Prime Minister's Office/Video Pool via AP)

The persistent colonial psychology of America and her allies will mitigate against the acceptance of a multilateral world. America continues with her objective of destroying BRICS by fearing China's dominance in manufacturing, growing independence in technology and her increasing military prowess; by wanting control of Russia's natural resources; and by needing regime change in Iran to control Iran's energy resources.

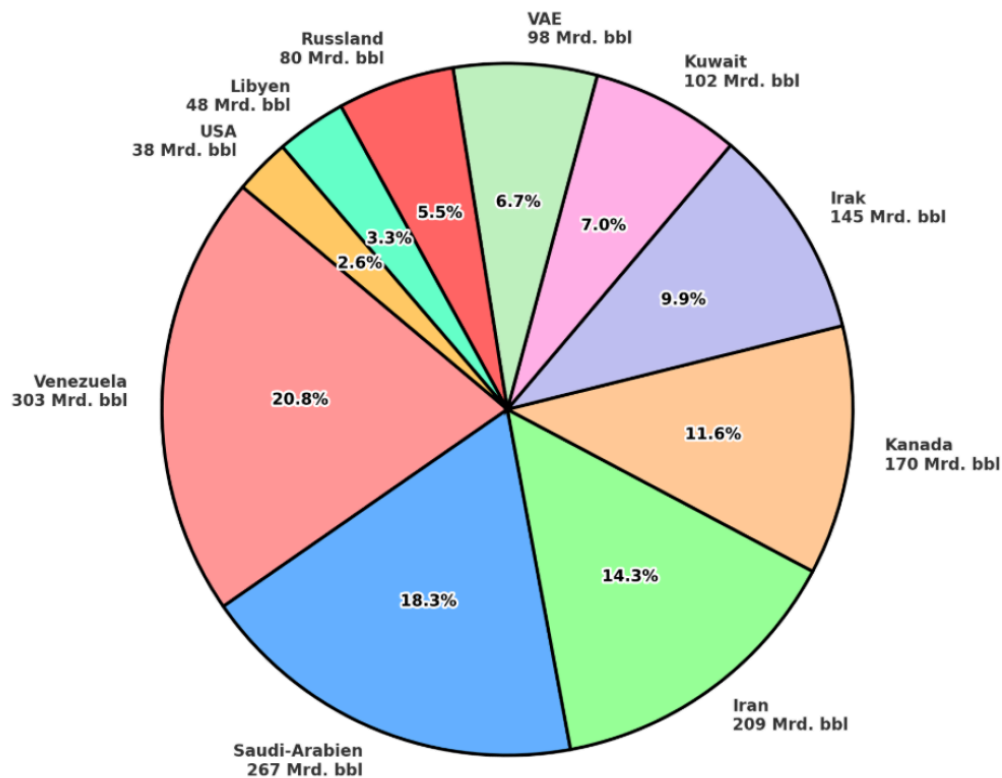


New York Post is fuming, September 4th, 2025

If any one country can gain control of energy resources de facto that country controls the world. This philosophy seems central to America's foreign policy. We can see how this story is playing out.

First, the bombing of the light Venezuelan ship that had insufficient fuel to reach the coast of America, was heading in the wrong direction and with photos not showing any packages that could contain drugs would appear to be a false flag US operation as the excuse to attack Venezuela.

Top 10 Ölreserven weltweit (2025)



Oil-Reserves worldwide – Graphic: Forum Geopolitica (bbl = billion barrels)

The country has the largest known oil reserves in the world at 303 billion barrels.

Second, to the SE of Venezuela lies Guyana, home to one of the fastest growing hydrocarbons producing countries in the world. The elections on 1st September were won again by President Irfaan Ali, a friend of America's. Oil production is on target to reach 1.3 million barrels of oil/day by 2030.

Third, to the south of Venezuela sits Brazil a member of BRICS, the largest country on the continent with a GDP of \$2.2 trillion and 10th largest in the world and oil reserves of around 16 billion barrels per day. And Brazil is the only BRICS member in S America.

Fourth, further south on the S American continent lies Argentina with oil and gas production in the massive Vaca Muerta shale resource taking off at a time when the country's president Javier Milei's political party was roundly defeated in local elections. Will his friend President Trump come to his rescue in some way?

Fifth, Mexico's oil production is some 2.5 million barrels/day, and her reserves are about 9.7 billion barrels. As the Monetary Sceptic noted 'the upcoming war against cartels by America Vig from pipeline operators in exchange for transiting through

territories they control'. This may be the prime reason why Washington is going after the Mexican cartels. He wants control of the country's oil.

Sixth, the Gulf oil producers though professing independence are in fact dependent for their security and livelihood on America – and to a lesser degree Britain – for historical reasons. These countries will march to American orders even though professing their moves are the best for their country.

Seventh, America wants control of Iran not just to accommodate Israel but via a regime change to control Iran's oil output and reserves.

Eight and finally America's long held objective, one fully recognized by Russia is to dismember Russia and in doing so control Russia's vast natural resources including hydrocarbons.

These eight moves appear to be Washington's long-term strategy to retain her global hegemony. One part of that strategy is to increase her influence over S. American countries not just for their hydrocarbon reserves but their large reserves of important minerals such as copper. Influencing the direction of that output would be a powerful tool.

EXCLUSIVE

Pentagon plan prioritizes homeland over China threat

This marks a major departure from the first Trump administration, which emphasized deterring Beijing.



Chinese female troops march during a military parade marking the 80th anniversary of victory over Japan and the end of World War II, in Beijing's Tiananmen Square on September 3, 2025. | Pedro Pardo/AFP via Getty Images

POLITICO, September 5, 2025

In sum, in a dividing world, American policy is increasingly focusing on securing her own backyard. This switch is reflected in the [current draft National Defense Strategy](#) pivoting away from China towards securing the homeland and the Western hemisphere wrote Alastair Crooke. Will such a strategy survive some of the opposing powers in Washington with the only strategically meaningful option being Iran?

The second important development was the progress made in SCO and BRICS moving towards their own currency as well as how they are reducing the use of the US dollar in trade within member countries.

BRICS accounted for around 22% of global trade or almost \$7.5 trillion last year. Trade in non-dollars between member countries is running at around 70% of this year's trade or about \$5,25 trillion. One significant impact of not using US dollars as Russia and China have discovered is that transaction costs have fallen by 2-3% or by \$4-6bn last year.

As part of this switch from trading with US dollars into local currencies India issued an official circular last month allowing BRICS members to conduct 100% of their trade in Indian rupees.

Whatever will be the form that the BRICS currency takes it will be supported by gold so allowing member countries running surpluses with another member's currency the option of converting those surpluses into gold. The option is made possible by the Shanghai Gold Exchange constructing gold vaults in member countries. One is near completion in Saudi Arabia.



Russian President Vladimir Putin, Chinese President Xi Jinping, North Korean leader Kim Jong Un, Pakistan's Prime Minister Shehbaz Sharif and heads of foreign delegations arrive for a military parade marking the 80th anniversary of the end of World War Two, in Beijing, China, September 3. Sputnik/Alexander Kazakov

A third significant outcome of the meetings in China was that North Korea's leader Kim Jung Un was brought in from the cold as it were, standing next to President Xi on one side with President Putin on the other side of Xi. The significance is that N

Korea is now part of the strategic alliance with China and Russia and will become an integral partner in developing Siberia and Russia's Arctic lands (more on this another day).

It is, however, moves which have taken place since those meetings in China that are just as if not more important.

Doha Attack by Israel

First, there was Israel's attack on the meeting place in Doha where Hamas's negotiating team were supposedly meeting. Senior members of the team having been tipped off by Russian and Chinese intelligence vacated the room but left their mobile phones in the meeting room. Instead of assassinating the team leaders Israel killed their underlings.

From what we learn, it is highly probable that US was a party to the planning and coordination of the plan from the earliest planning stages. For instance, Israeli Channel 11 reported that the US had approved the action about which Trump was then informed. Despite questioning the attack, Trump said he applauded any killing of Hamas members.

In sum, we can conclude that Israel was complicit in the attack on Hamas in Doha. What are the consequences?

First, Qatar will talk tough as will other Arab leaders but will do nothing. At heart they are too subservient dependent on America's military power for their security.

Second, Trump is pursuing an escalatory policy with Ukraine and over Iran. The attack in Doha only confirms the Iranian leadership that a joint Israeli American attack is coming. Iran has been preparing for such an attack with new missile defense systems coming in from Russia and China. The next attack will not have any theatrics attached or warning signs given: the attack will have one primary objective to destroy enough of the country that Iran's population will want regime change. That policy will fail as the country is more united, especially within the younger generation behind the Supreme Leader than ever.

Third, the attack on Hamas in Doha confirmed Russia's conclusions that peace is not Washington's objective as Trump's ability to implement the policies he wants is overridden by the forces that surround him. This was understood clearly by Putin and his colleagues and reverberated in their discussions in Tianjin and Beijing.

As Alastair Crooke wrote today, „That spoke to Trump’s future intentions – no structures, no signals, no real commitment to peace. Instead, the Russians see a Trump regime that is dallying with the opposite – with European plans to rearm Ukraine.“

And fourth, it probably means the end of the Abraham Accords and instead the road to Greater Israel supported by President Trump is what Israel will pursue. Israel wants Lebanon and tracts of Syria.

Drone Attack on Poland

There is no evidence that either Russia or Belarus fired the drones that supposedly landed in Poland. This was another attempt of blaming Russia for an attack that they never did – in other words it was a ‘false flag’ operation.



Taped-together “Russian” drone “attacks Poland”

The importance of this alleged drone attack on Poland is that tomorrow the long-awaited and feared Russian-Belarus Zapad 2025 military exercises start.



Indian personnel departs to participate in Zapad 2025 military exercise – [Indian Armed Forces](#), September 9, 2025

These exercises happen only once every four years and involve hundreds of thousands of troops. In response, Poland has sent a reported 40,000 troops to the Belarus border following their own exercises to prepare for the Zapad.

Meanwhile, Poland's government has called on NATO allies to invoke Article 4 which is a forum to discuss the security of a member country. Poland's president said that the „Russian provocation was nothing more than an attempt to test our capabilities and response. It was an attempt to check the mechanism of operation within NATO and our ability to react“. Sometimes Article 4 precedes Article 5.

The next three months will be a very nervous period for Europe; with the Zapad exercises a mistake either by the Russian/ Belarus side or by Poland or by Ukrainian forces and their NATO intelligence assets could precipitate a serious escalation of NATO's war against Russia.

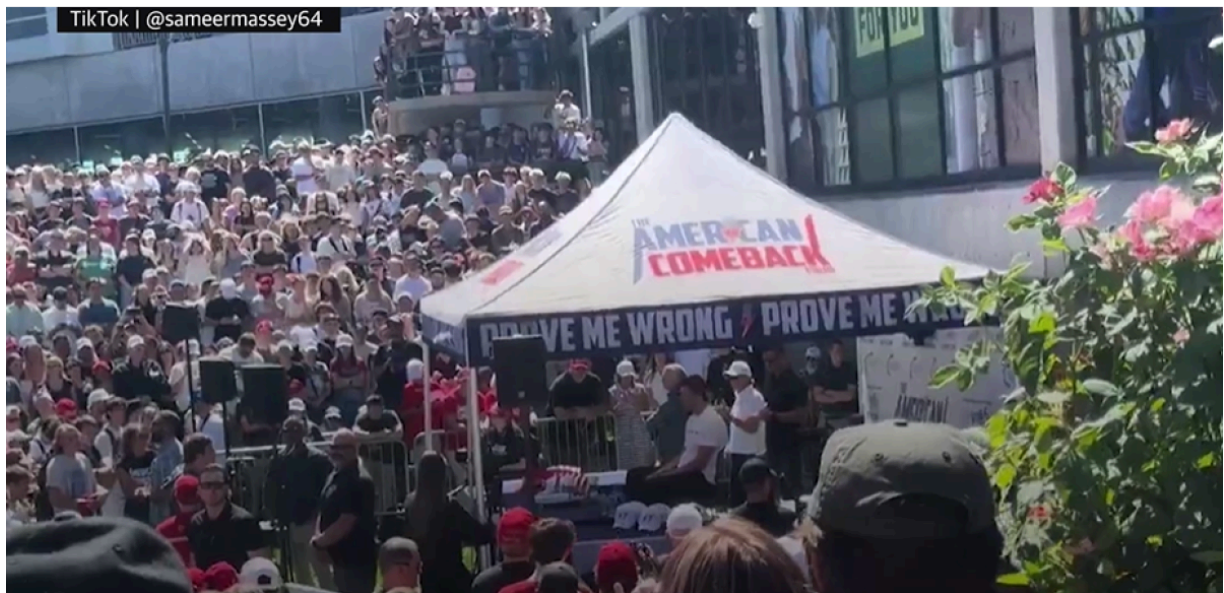
The EU needs war to distract their electorates from the internal problems of debt rising faster than economic growth, the power of Brussels over national economies and immigration. War may be the answer for some of their leaders.

Charlie Kirk's Assassination

„Tonight feels like some sort of invisible line has been crossed that we didn't know was there“ [posted](#) Konstantin Kissin on X-post yesterday.

Charlie's assassination is part of the conservative movement trying to wrest control from the liberalism that has governed policy since President Reagan. This internal American battle between conservatism and liberalism will take years before the answer will be found.

It is a battle also being fought across Europe and the UK. How can six AFD candidates for the forthcoming elections in Germany suddenly and unexpectedly die in the space of a couple of weeks?



Utah Valley University, September 10, 2025. Charlie Kirk speaks to approximately 3,000 students under a tent bearing the slogans “The American Comeback” and “Prove me wrong.” Shortly thereafter, he was shot and killed during his speech. Image: [The Guardian](#)

Charlie Kirk was a conservative leader with a following of over 7 million. His death reminds us of that fateful day 62 years ago. It is the rise of conservatism over liberalism that is part of the crises seen in the Fourth Turning.

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