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Limits to the No-Limits Partnership: Russian Leadership Perceptions of Diverging Interests with China

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Executive Summary

This study examines Russian leadership perceptions of pressure points and areas of divergence in Russia's relations with China, and the degree to which Russia acts to mitigate or exploit such differences. It explores Russian views through three analytic lenses: military/security relations; economic and technological ties; and approaches to other world regions and key multilateral groupings. In each of these areas, we focus on the degree to which Russian senior decision-makers are motivated to prevent such differences from derailing their broader partnership with Beijing, where and how they may be hedging against dependencies, and what tools and instruments Russian leaders employ to exploit such divergences to advance Russian interests.

In key respects, Russia and China have never been closer. Political and intergovernmental ties are expanding. Military cooperation, security and law-enforcement coordination, research and education links, state media ties, and business and financial interactions are unprecedented; each has become denser, broader, and more routinized over the past five years. The two countries have signed dozens of cooperation agreements covering energy, military ties, cybersecurity, aerospace, finance, healthcare, media, science, technologies, scholarly exchange, student mobility, transportation, and agriculture. Together they contest key norms and principles underpinning the Western-led international order. They promote plurilateral organizations that exclude the West, such as the expanding BRICS and the Shanghai Cooperation Organization. They have also engaged in "de-dollarization," working to create an international payments system that is an alternative to the current SWIFT system, and increasingly conducting their bilateral trade in the Chinese yuan.¹

Yet Russia's partnership with China is far from being a "friendship without limits;" the relationship is opportunistic, exploitative, and full of contradictions. Historically rooted distrust, concerns about international standing, and competitive commercial, technological and geopolitical impulses limit the depth and breadth of the relationship. It is more a partnership of convenience than of conviction between two strategically autonomous actors who have fundamentally different views of the world.²

Russia's strategic dependence on China has deepened considerably since Moscow's full-scale invasion of Ukraine in February 2022. China has become the chief enabler of Russia's war. Moscow has benefited from Beijing's energy purchases, supplies of militarily relevant goods and technologies, and generally supportive diplomatic stance.

At the same time, Russian decision-makers chafe at Beijing's dominance of the relationship, which is historically unparalleled. They are uncomfortable with their junior partner status and China's exploitative approach. They are worried about Chinese espionage, cyberattacks, and theft of military technologies. They believe there are serious limits to Russia-China cooperation in the nuclear domain. They are concerned by the growing economic power asymmetry between the two countries, which affects Russia's regional influence and global standing. They are anxious that entire ecosystems of dependence on China are emerging, from supply chains, transport corridors and financial architecture to artificial intelligence and rare-earth mining, processing and refining. They are apprehensive that Beijing is opportunistically buying Russian energy but avoiding any deep capital exposure to help Russia develop its energy infrastructure. At times they differ with their Chinese counterparts when it comes to third regions such as the

Arctic, Africa and Central Asia, and multilateral groupings such as the Shanghai Cooperation Organization, the BRICS+, and the UN.

Russian officials engage in internal debates about how far Russia should allow its dependence on China to further develop. Nonetheless, the prevailing sentiment under Putin is that Moscow should prevent specific differences with Beijing from derailing their broader partnership, especially since China is careful to deal publicly with Russia as if it were an equal, supports Russia's position on Ukraine, and amplifies Russia's anti-Western agenda. The Kremlin views the key task as asymmetry management: Russia's leverage comes from commodities, geography, and its security role; China's leverage comes from capital, manufacturing scale, technology ecosystems, its support for Russia's war against Ukraine, and its ability to be patient.

Russian and Chinese decision-makers have learned to operate within the shifting parameters of their relationship. Both are careful to manage their differences, seem to understand the other's red lines, and appear to recognize the boundaries of possible areas of agreement. They have managed to establish an equilibrium within the asymmetric relationship that is constantly evolving and adjusting to circumstances. As China's structural advantages mount and pressures build within Russian society, however, Russian decision-makers are finding it more difficult to sustain this equilibrium.³

Topic I. In what ways do senior Russian decision-makers believe Russian interests diverge from those of China in security and military areas, such as Russia's war against Ukraine, arms deliveries and nuclear weapons?

Russia, China and the War in Ukraine

China's support for Russia's war against Ukraine must be understood in the framework of their evolving relationship since the Soviet collapse. It is a pragmatic, transactional partnership driven by shared grievances against the United States, not shared values. For centuries, Russia's ties with China were complicated and often adversarial, with a series of armed clashes, culminating in a short war on the Sino-Soviet border in 1969. Russia and China have never been natural partners. Russians consider themselves culturally to be Europeans, not Asians, and both nations look down on each other. Nevertheless, Russia's and China's increasingly adversarial relationship with the West has created an instrumental partnership that has strengthened since Russia's full-scale invasion of Ukraine.

Vladimir Putin has courted China since Xi Jinping came to power in 2013 and especially after the annexation of Crimea in 2014 and the imposition of Western sanctions on Russia. Xi's first foreign trip was to Russia and the two leaders have met each other more than forty times since then. They apparently enjoy close personal ties, even if one discounts the hyperbole they use when praising each other. Both are autocratic leaders allergic to Western criticisms of their democratic deficits. Neither publicly criticizes the other's domestic repression. Both publicly favor a "multipolar" world in which the United States is weakened and retreats from their respective neighborhoods.⁴

The burgeoning Russian-Chinese relationship entered a qualitatively new stage in 2014 after Russia annexed Crimea and launched a war in Ukraine's Donbas region. It was further strengthened after the full-scale invasion of Ukraine in 2022. The imposition of wide-ranging Western sanctions, which Beijing does not support, made China Russia's indispensable economic and military partner in the war, greatly increasing Russia's dependence on China for its ability to continue and survive the conflict.

Putin would not have launched his full-scale invasion of Ukraine had he not understood that China would support him. He traveled to Beijing in February 2022 to attend the Winter Olympics and to confer with Xi. They subsequently declared their partnership "without limits." Whatever Putin may have told his Chinese counterpart about his invasion plans, it appears that Xi, like many of his Western counterparts, expected a limited Russia incursion to secure the rest of the Donbas region that Russia had been trying to conquer since 2014, not a full-scale invasion. He was also shocked by Russia's subsequent military setbacks.⁵ The Chinese ambassador to Washington at the time denied that Xi had any foreknowledge about a full-scale invasion.⁶ Nevertheless, once the invasion happened, China had no choice but to back Putin.

From Moscow's point of view, Beijing has been the key, indispensable enabler of the Kremlin's continued ability to wage war in Ukraine. China has been Russia's economic lifeline in this war. Although officially neutral, Chinese stance is a pro-Russian neutrality. China has reiterated the Russian narrative that the West was responsible for the war because it undermined Russia's legitimate interests by encouraging Ukraine to join NATO and using Ukraine as a platform from which to threaten Russia's security. China supports Russian narratives if they advance China's long-term strategic interests. Most of these, such as ideas of an aggressive United States, Western "weaponization" of sanctions and criticism of NATO and "bloc-based" confrontation, are tied to both countries' common struggle against perceived U.S. hegemonic power and the U.S.-led liberal world order.⁷ China has abstained from UN resolutions condemning the Russian invasion and continuing war in Ukraine.

Even more importantly, China has provided Russia with economic, political and diplomatic support. China's economic support is critical for the Kremlin and cannot be replaced by any other country. China has also supplied machine tools, microelectronics, and other technology that Moscow is using to produce missiles, tanks, aircraft, and other weaponry for use in its war against Ukraine. Even if China does not directly export weapons to Russia, it supplies key components used in Russia's arsenal. Military cooperation has also increased significantly in the past few years. As a result, since the war began, Chinese-Russian relations have continued to deepen.

The two countries' "comprehensive strategic partnership of coordination for the new era" has effectively evolved into an informal anti-U.S. alliance. According to the official narrative, China and Russia share a relationship that "surpasses allied relations."⁸

Despite China's explicit disapproval, the Kremlin has repeatedly employed nuclear threats against the West and Ukraine. Russia also deployed nuclear weapons in Belarus in defiance of China's officially stated opposition to such deployments in third countries. Nevertheless, China has refrained from directly criticizing these actions. Therefore, the evidence suggests that the Kremlin is willing to accept the existing asymmetry in its relationship with Beijing, believing that the risk of China exploiting this imbalance is mitigated by the fact that Russia remains an indispensable ally for China in its confrontation with the United States. Moreover, the longer

Russia pursues this war, the less likely it is that the United States will turn its attention to China's actions against Taiwan.

Indeed, Chinese Foreign Minister Wang Yi told the European Union's foreign policy chief Kaja Kallas that Beijing cannot accept Russia losing its war against Ukraine as this could allow the United States to turn its full attention to China.⁹ Putin also understands that China fears that, if Russia loses the war, Putin could be replaced by a new leader who might rethink Russia's close ties to China and move closer toward the West. Putin sees China as essential for preserving his regime's—and his personal-- security. Conversely, while China would welcome a resolution of the war on terms favorable to Moscow that keep Putin in power, it would prefer that the war not end with a resounding Russian triumph. This could encourage Putin to challenge the territorial integrity of Ukraine's neighbors, and China does not want to be drawn in to a wider campaign to overturn the post-Cold War order. Moreover, an emboldened Putin might rethink how dependent on China he wants Russia to be, particularly if he were to succeed in improving ties with the United States. He could then utilize that increased clout to push back against Chinese moves in the Arctic or Central Asia.¹⁰ In the end, China is supporting Russia just enough to ensure it does not lose, but not enough to ensure it wins decisively.

The clearest evidence that Russia has doubts about the durability of its limitless partnership with China emerged in a leaked document from the FSB. The Russian concern about longer-term Chinese goals referred to China as “the enemy,” warning that China is a serious threat to Russian security.¹¹ For now, however, the Kremlin sees no choice but to stick with its asymmetric partnership with China, the only country that can help it continue to fight Ukraine. For Russia, the war has become a test of its alliance with China – and the outcome has been positive. Despite intense Western pressure and formally distancing itself from the conflict, China has provided Russia with tangible support which, particularly in the economic sphere, is absolutely irreplaceable for the Kremlin. The positive outcome of the *de facto* alliance with China will encourage the Kremlin to further extend the cooperation aimed at weakening the West's position and to continue working with China to build a new international order that would be ‘friendly’ to both regimes.

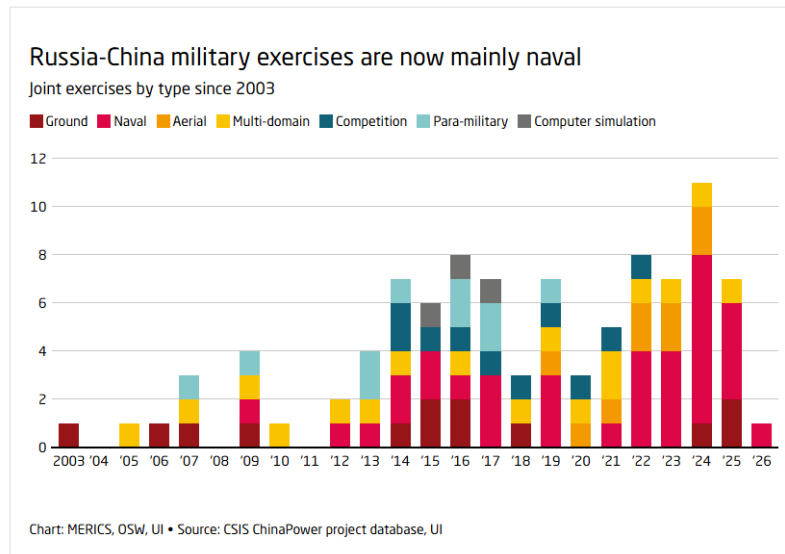
Military Cooperation

Since 2003, Russia and China have conducted 97 joint military exercises across various domains and formats. These include ground, naval, aerial, para-military and multi-domain exercises, as well as army competitions and computer simulations. The number of exercises per year has increased in recent years, reaching an all-time high of 11 in 2024, but decreasing in 2025.¹²

Since 2022, most joint exercises – 20 of 34 – have consisted of naval drills and patrols, accounting for all recent growth in joint exercise activity. Between 2009 and 2022, Russia and China conducted only a few such exercises annually. However, in 2024 alone, 7 of 11 exercises were naval, and in 2025, 4 of 7 were naval drills and patrols.

It remains unclear whether China participated in the early-2026 trilateral naval exercise with Russia and Iran amid the significant U.S. military buildup in the region prior to the Iran war in February.

Figure 1.¹³



While Russia has trained Chinese troops in Russia for years, covert Chinese training of Russian military personnel in China began in 2025 under a bilateral agreement signed by senior Russian and Chinese officers in Beijing on July 2 last year. Some of the Russian trainees returned to fight in Ukraine. Until now, bilateral exercises and training have stopped short of promoting joint operations or fostering interoperability of forces.¹⁴

Arms Trade

Arms trade became a key component of the Sino-Russian relationship since ties improved after the Soviet collapse, but it increased greatly in importance after Russia's 2014 annexation of Crimea and the imposition of Western sanctions because it provided needed revenues for Russia. Prior to the full-scale invasion of Ukraine, the relationship consisted primarily of China importing Russian arms and Russia ensuring that it did not sell China its most technologically advanced weapons due to concern that China might reverse engineer them and start producing them. Since 2022, however, there has been a role reversal in the bilateral arms trade. Russia has become increasingly dependent on China for components that are of critical importance in enabling it to prosecute its war against Ukraine. As in many areas covered in this study, the Kremlin may have qualms about this new reality, but it has no choice but to maintain this dependence on Chinese military imports as it seeks to win the war.¹⁵

Sino-Russian arms trade has experienced cycles of greater and lesser intensity. From 1991-2005, Russian arms sales to China averaged around \$2-3 billion a year and involved sales of combat aircraft, ships, submarines, air defence systems and other weapons. Sometimes these sales led to licensed production agreements whereby Chinese firms could produce Russian weapons locally. From 2005-2015, Russian arms sales declined because of increasing Chinese self-sufficiency and Russian concerns about Chinese reverse engineering. Then Russian arms sales increased after 2015, with Chinese purchases of the Sukhoi-35 combat aircraft and the S-400 air defence systems. More licensed production agreements followed. Prior to 2022, total Russian revenues from arms sales to China significantly exceeded those from all other Russian arms clients except

India, which has for three decades been Moscow's largest arms importer. China has, therefore, been a key weapons client for decades.

Since February 2022 and the imposition of international sanctions on Russia, neither country is making public their arms sales agreements. China has sought to avoid the imposition of secondary sanctions on countries that violate the sanctions imposed by the United States, Europe and Asian allies. Russia and China are also pursuing joint military development projects, including in missile attack warning systems, non-nuclear submarines and missile defense systems. However, despite these projects, Russia is supplying fewer weapons to China than in previous years both because of greater Chinese self-sufficiency in arms production and Russia's focus on domestic production for its war effort. Overall, Russia's role as a major global arms supplier has declined since it invaded Ukraine.¹⁶

Without Chinese military imports, Russia would not have been able to continue fighting Ukraine as long as it has. Multiple rounds of Western sanctions have rendered Russia far more dependent on China than before Russia first invaded Ukraine in 2014. China has stepped in to provide Russia with what it needs to prosecute its war. While avoiding direct lethal assistance to Russia, Chinese companies have provided substantial assistance to Russia's war effort. This includes dual-use technology, semiconductors containing U.S.-originated technology and machine tools. China has also played an important role in helping Russia's production of unmanned aerial vehicles (UAVs), including 26 brands of drones and key components for the production of fibre-optic drones. This has facilitated the rapid expansion of Russia's drone production and reduced Ukraine's initial battlefield advantage in UAVs. Western analysts believe that, without Chinese imports, Russia would have faced critical shortages in the semi-conductors required for production of weapons crucial for its electronic warfare against Ukraine. China has also begun to invest secretly in Russia's UAV manufacturing facilities, which will further link the two countries' military-industrial complexes. The Ukraine war, has, therefore, substantially increased military integration between Moscow and Beijing.

From Russia's point of view, increased military cooperation with China signals predictability in the relationship, which is absent from Russia's relations with the West. Russia can count on China continuing to supply it with military hardware. Despite Russian discomfort at being so dependent on China, the Kremlin realizes that it has no other options, given its antagonistic relations with the West, to continue its current military relationship with China.

The Nuclear Dimension

Russian-Chinese cooperation in the nuclear dimension is more complex than their arms trade relationship. Russia has helped China build up its nuclear power sector and its nuclear arsenal, and the two parties have held joint missile defense exercises and conducted joint strategic bomber patrols. They differ on issues of nuclear doctrine and nuclear diplomacy, and Russian decision-makers are wary of China's expanding nuclear arsenal and its high-tech weapons.

Russia contributed significantly to the buildup of China's nuclear arsenal in the 1990s through Rosatom's cooperation work with Beijing on civilian nuclear power production.¹⁷ Rosatom was involved in the construction and operation of the CFR-600 fast neutron reactor used for the production of super-grade plutonium for nuclear weapons, which helped accelerate the development of China's nuclear weapons program. However, there are no joint projects developing nuclear warheads or delivery systems. Although China is now the world's third

largest nuclear power, Russia still has a much larger weapons arsenal than does China. The United States and Russia between them account for 86% of the world's nuclear weapons.¹⁸

Russia and China have held limited joint missile defense exercises but there is no evidence of advanced cooperation in developing China's strategic early warning system. Beijing has shown no interest in purchasing Russia's most advanced S-500 surface-to-air missile, after acquiring a small number of S-400 missiles in 2014. China is focused on enhancing its strategic defense system by building in space elements, and it is now far ahead of Russia in its space program with 1,300 Chinese satellites in various orbits as opposed to Russia's 300.

China and Russia have carried out provocative joint patrols by nuclear-capable strategic bombers since 2019, primarily over the Sea of Japan and the East China Sea. In July 2024 a joint patrol entered NORAD's air defense identification zone near Alaska, triggering interception by U.S. and Canadian fighters. Joint patrols near Japan in December 2025 forced Japan and South Korea to scramble jets and led Tokyo to denounce the incursions as "deliberate acts of intimidation."¹⁹ Beijing views joint bomber patrols as important for showing the satisfactory performance of its modernized bombers.²⁰ Moscow views them as a way to prove that its strategic bombers are still capable of both combat and demonstrative tasks -- a message that gained greater urgency after Ukraine carried out a bold and unprecedented coordinated drone strike deep inside Russian territory in June 2025. The operation targeted four strategic air bases and delivered a major blow to Moscow's long-range bomber fleet. Codenamed "Spider's Web"—or simply "Web"—the operation was named for its wide geographic coverage across remote Russian locations previously thought to be beyond the reach of Ukraine's long-range drone capabilities.²¹

Despite these joint shows of force, both Moscow and Beijing prefer to rely on their own respective defense-industrial bases and technologies in modernizing their deterrence capabilities.

There is more discord between Moscow and Beijing on issue of nuclear doctrine and nuclear diplomacy. Putin's periodic threats to use tactical nuclear weapons against Ukraine and evidence that Russia seriously considered doing this in the fall of 2022 have put Moscow at odds with Beijing, which opposes threats of nuclear weapons use and reiterates the statement made by the UN's five permanent Security Council members that "a nuclear war cannot be won and must never be fought."²² Whereas Beijing advocates a policy on "no first use" of nuclear weapons, Russia has revised its nuclear doctrine to cover admissible uses of nuclear weapons. A December 2024 document outlines a wider range of contingencies that might trigger nuclear weapons use, especially in regard to non-nuclear weapons threats to Russia and its allies, and appears to lower the threshold for nuclear use.²³ There is some evidence that the language in Russia's new doctrine is less aggressive than the Kremlin might have wished because of signals from Beijing. Russia may, however, believe that in reality Chinese public comments delegitimizing nuclear first use are intended to mask China's own nuclear arsenal buildup.

Russia and China also disagree on the future of arms control. The Kremlin would like to engage the Trump administration in strategic stability talks to negotiate a follow-on treaty to the expired New Start treaty that limited both sides' strategic nuclear arsenals. The U.S. insists that China must be involved in these talks but Beijing has repeatedly refused to agree to limit its own growing nuclear arsenal. In the absence of Chinese participation in strategic stability talks, Moscow is unlikely to achieve its goal of bilateral negotiations with Washington.

In response to these developments, Russia carried out tests on its nuclear-propelled Burevestnik cruise missile and its nuclear-propelled Poseidon underwater vehicle. In response, the Trump administration announced its intention to resume nuclear testing after 33 years. The Chinese reacted negatively to both the Russian testing and the U.S. announcement, reiterating their commitment to the Comprehensive Test Ban Treaty. Beijing is especially concerned about the possibility that Japan and South Korea might decide to develop their own nuclear weapons capability, in view of the threat they perceive from North Korea's nuclear arsenal. Russia appears to be less concerned about this possibility. Indeed, China is concerned about Russia's support for North Korea's nuclear program. It is not clear what Russia is providing Pyongyang in return for North Korea's support for the war in Ukraine—supplying artillery, rockets and soldiers—but the assumption is that Russia could be helping North Korea develop its nuclear program. China's displeasure at the growing Russia-North Korea partnership has been evident for some time.

Although Russia and China cooperate on various aspects of their respective nuclear programs, the evidence suggests that Russia is concerned about China's expanding nuclear weapons arsenal and development of high-tech weapons. Russia monitors China's rapidly expanding nuclear weapons arsenal, but its experts rely on Western, not Chinese, data. Bogged down in a war in Ukraine, with serious economic problems and a GDP far smaller than China's, Russia's nuclear weapons arsenal—the largest in the world—is the one remaining asset it has that gives it the status of a great power. The Kremlin therefore seeks to make the nuclear instruments of its policy the centerpiece of its global interactions. Hence Putin's recurrent warnings about Russia's nuclear weapons and its intention to use them should its security be threatened by the West. China, on the other hand, seeks to minimize the potentially disruptive risks of Russia's nuclear brinkmanship. These risks will increase in the event that Russia believes it cannot prevail over Ukraine. These divergences will continue to act as a brake on the two countries' cooperation in the nuclear domain.

Topic II. In what ways do senior Russian decision-makers believe Russian interests diverge from those of China in such economic areas as commercial and financial ties, investment, energy, technology transfers, natural resources, cybersecurity, and trade routes?

Commercial and Financial Entanglements and Their Limits

Russia's commercial relations with China are profoundly lopsided: China has become the enabler of the Russian economy – its main buyer of resources, its main importer and source of critical technologies and machinery, its main payments hub. After Moscow was hit by sanctions following its February 2022 invasion of Ukraine, China stepped up its purchases of Russian oil, gas and coal and filled the void left by departing Western firms by supplying passenger cars and needed inputs for Russian industry, including military-related items.²⁴ Russia is now dependent on China for 90% of its sanctioned technology imports, up from 80% a year ago.²⁵

As Russia depends more on China, China relies less on Russian energy and Russian technologies, does not depend on Russian demand, and carefully limits its investment exposure

to the Russian economy. This pattern is likely to persist and intensify, as the Kremlin lacks viable alternatives. Russian officials have largely resigned themselves to their growing dependence as necessary to preserve a partnership that they believe is indispensable for sustaining their war against Ukraine and rebuffing Western efforts to isolate Moscow.²⁶

China has solidified its position as Russia's top trading partner, accounting for roughly 30% of Russia's total exports and 57% of its imports. Russia, on the other hand accounts for only 5% of China's imports and about 4% of its exports. Bilateral trade hit a record high of 1.74 billion yuan (\$249 billion) in 2024, declined slightly to 1.63 trillion yuan (\$234 billion) in 2025, and is again rising in 2026: 14.8% year-on-year growth in the first quarter of 2026, with Chinese exports to Russia surging by 22.1% and Russian exports to China increasing by 9.5%.²⁷

Figure 2.²⁸



Russia's growing commercial dependence on China is being accelerated by its greater reliance on the Chinese yuan. Since being subjected to financial sanctions and partially disconnected from the SWIFT payments system, Russia has turned to alternative means of settlement, including China's Cross-Border Interbank Payment System (CIPS), cryptocurrencies, netting and clearing schemes, and the use of 'transit' currencies such as the yuan and the UAE's dirham, which have largely replaced traditional settlements in U.S. dollars and euros. This restructuring has preserved export flows but rendered trade less transparent, more costly and more dependent on a limited number of partners – particularly China, the UAE and several other Asian countries.

The yuan plays the role of a surrogate reserve currency for the Russian economy. 95-99% of Russia-China bilateral trade is now settled using either the yuan or the ruble. The yuan has also become the primary currency for international transactions in the territories of Ukraine currently occupied by Russian forces. The yuan accounts for over half of all currency trading on the Moscow Exchange.²⁹

This is a striking intrusion into Russian economic sovereignty. Russia is now more economically and financially dependent on China than it was on the Western-led global financial system. At the same time, the low risk tolerance of Chinese banks is setting limits on the no-limits

partnership. Major state banks in China have curtailed or suspended yuan payments from Russia, while smaller banks demand complex collateral or high fees and have tightened compliance amid the risk of secondary sanctions, generating payments bottlenecks.³⁰

Limits on Investment

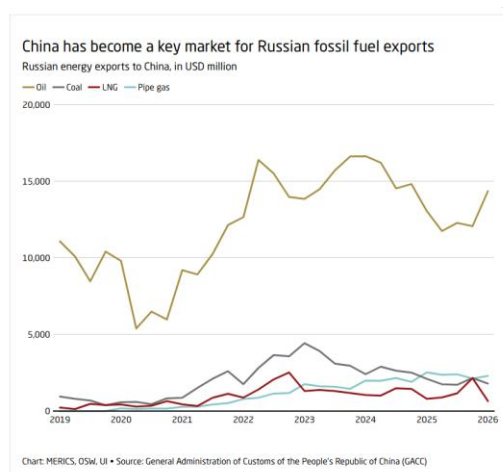
Moscow would prefer that Chinese firms export less to Russia and instead invest at scale in Russian industrial sectors. However, with few exceptions in oil and gas extraction and processing – areas that align directly with China’s core economic interests and constitute the backbone of Russian exports to China – Chinese firms have been careful to limit their investment exposure to the Russian economy. At present, there are no credible scenarios under which Chinese companies would launch large-scale industrial investment projects in Russia with the backing of the Chinese state. Any such initiatives are likely to remain isolated, private and undertaken at the investors’ own risk, without political or financial guarantees from Beijing.³¹

The more likely development points in the opposite direction. China is increasingly inviting Russian state-owned corporations to invest in China or to establish joint ventures on Chinese territory. For Russian companies, such arrangements offer a potential pathway to mitigate EU and U.S. sanctions by embedding operations within Chinese legal and corporate structures. Yet here too there are limits. Beijing has not opened its financial system, provided preferential loans, or integrated Russian firms into Chinese telecom or semiconductor supply chains. Chinese companies supply finished goods but avoid strategic co-production or technology transfer. In practice, cooperation grows only where it aligns with Chinese commercial interests and carries minimal political risk.³²

Energy Cooperation: Weakened Petrostate, Rising Electrostate

Russia is China’s largest supplier of oil and natural gas.³³ Russian leaders depict their energy ties with China as the backbone of the “no-limits” partnership. The Kremlin showcases energy flows to signal that the West has been unable to isolate Russia and that Moscow continues to benefit from Beijing’s strategic support. Pipeline gas features prominently in Russia’s “pivot to the East” narrative. China similarly uses its energy relationship with Russia to convey the message that the relationship is unbreakable.

Figure 3.³⁴



In 2025, Moscow accounted for 17.9% of Beijing's oil imports.³⁵ Russia's seaborne oil exports surged to an all-time high of 1.92 million barrels per day in February 2026. China's state oil companies Sinopec and PetroChina suspended buying Russian oil in late October 2025 after Washington imposed sanctions on Moscow's two biggest oil companies, Rosneft and Lukoil. However, they resumed seeking Russian crude oil cargoes in early 2026 to head off supply shortages caused by the war in the Middle East and take advantage of a temporary U.S. sanctions waiver. Russian oil remains cheaper than rival supplies from Brazil and West Africa.³⁶

In 2025, Russia accounted for 27.8% of China's natural gas inflows. The Power of Siberia 1 natural gas pipeline reached its nominal capacity of 38.8 bcm in 2025, almost four times the size of its flows in 2021. Russia needs additional pipelines to expand its market share further.³⁷ Moscow and Beijing signed an agreement in September 2025 to build Power of Siberia 2 (PoS-2), a long-delayed pipeline to supply up to 50 bcm/year of Russian gas from western Siberian reserves to China via Mongolia. If completed, it could generate up to \$4.3 billion in annual revenue for Moscow. While that is much less than the \$20 billion it was receiving from its gas trade with Europe, it is still significant.

Russia also nearly quadrupled its LNG exports to China between 2019 and 2025, delivering a record 9.9 million tons last year, 18% more than in 2024. This stunning growth is due to China's willingness to ignore international sanctions and import cargoes from the Arctic LNG-2 facility.³⁸

Helium is a less visible but potentially important indicator of energy ties given its importance to semiconductor manufacturing. China relies on imports for 85% of its helium. Russian helium exports to China averaged 38 million cubic feet per month in 2025, up 60% year-on-year. Russia stands to gain further this year due to disruptions to gas processing in Qatar, which accounted for 54% of Chinese helium imports in 2025. Russia's Rostec and China's Thiko Energy Group signed a "strategic co-operation memorandum" in April 2026 to advance a "China-Russia Cross-Border Hydrogen Energy Corridor" project involving the construction of facilities to produce hydrogen from natural gas and a chain of fueling stations along highways between Russia and China.³⁹

Despite these dynamics, Russian leaders are acutely aware that the "no-limits partnership" in energy is structurally asymmetrical: for Russia, China is the indispensable outlet; for China, Russia is a discounted option. Energy shortages stemming from the Iran war and disruption in Venezuela may have temporarily raised the value of the Russia option for China, but over the medium- to long-term Beijing has more leverage than Moscow – and Russian elites know it.

Russia-China energy asymmetry consists of several elements. First, bilateral energy ties are transactional: trade is heavy, capital is scarce. Russia needs external capital and equipment for LNG and complex energy projects, but Beijing is not buying in; Chinese firms have been careful to limit their investment exposure to the Russian economy. Moscow elites complain that China opportunistically buys Russian energy but largely avoids new upstream investment and major greenfield co-projects, particularly those under sanctions risk, despite the availability of distressed assets and "buy-in" opportunities after 2022.⁴⁰

Second, while Russia can provide China with large volumes of energy that avoid transiting key energy chokepoints, economic policymakers in Beijing have been careful to diversify suppliers to avoid becoming overly reliant on any single supplier, including Russia.⁴¹

Third, while Russia has maintained its core gas production capabilities after four years of war and sanctions, it has far fewer ways to sell it. China's ability to negotiate significant discounts and tough terms from Russian suppliers has fanned Russian elite fears that the country is moving from a market-setter to a price-taker. Bilateral haggling over the PoS-2 project is emblematic: even though the deal has been signed, it has not been sealed. Major details, especially the gas price, remain contested and could delay realization for years.⁴² Russian decision-makers believe that their leverage is limited. China can negotiate from a position of patience to delay final investment decisions, press for lower prices because it is now Russia's buyer of last resort, and push for greater flexibility on delivery volumes to ensure that it is not locked into a high level of dependence on Russian gas. For Russian elites, PoS-2 is therefore not only an energy project; it is a measure of the partnership's "limits": if China can indefinitely defer binding terms, Russia's strategic "pivot to the East" remains rhetorically useful but economically incomplete.⁴³

China's energy leverage is not confined to gas. China stopped importing electricity from Russia in January 2026, as the cost of Russian electricity imports exceeded domestic electricity prices for the first time. Russian elites have been careful to publicly downplay the friction, but the dispute underscores China's leverage in extracting more advantageous terms.⁴⁴

Fourth, Western sanctions and the withdrawal of Western suppliers and service providers have forced Russian oil and gas producers to rely increasingly on China as a supplier of last resort for large parts of the energy-industrial value chain. Russia's turn to China has reduced immediate operational risk, but it has also created a new form of dependency on a foreign supplier ecosystem that is politically contingent and commercially brittle. After-sales support/spares are neither guaranteed nor fully aligned with Russian preferences on reliability, specifications, and lifecycle servicing. Russian decision-makers are concerned that China can turn this equipment reliance into a source of leverage and uncertainty.⁴⁵

A case in point is China-Russia cooperation on the Arctic LNG-2 project. The decision by China's Wison New Energies to cease ongoing Russian projects underscored how exposed Russian LNG ambitions are to supplier risk and pressures to comply with sanctions. Arctic LNG-2 produced just 6% of its design capacity in 2025. The project requires a dedicated fleet of 21 such vessels, but due to sanctions, Russia cannot obtain them. Chinese shipyards could build more, but no contracts have been signed.⁴⁶

Fifth, payments and settlement channels have become sources of friction as Chinese banks delay payments by weeks to months, heighten their compliance checks, and insist that a significant share of transactions is routed through intermediaries, often with high commissions and residual refusal risk. From a Russian leadership perspective, these frictions disrupt cashflow predictability for exporters, complicate dividend and investment planning, and create a sense of reduced sovereignty over export revenues.⁴⁷

Perhaps the biggest long-term problem for Russia is China's energy transition to an "electrostate" that will have diminishing need for Russian energy. Over the past two decades, China has transformed from a strategically weak energy power, dependent on imports of oil and gas, into the world leader in clean energy. It now accounts for roughly one-third of renewable energy generation capacity worldwide. Clean energy industries accounted for more than 11% of China's GDP in 2025 and over a third of its growth. Half of all nuclear reactors under construction worldwide are in China. More than half of all new cars sold in China are now

electric. China is the leading refiner of 19 of the 20 most critical strategic minerals essential for clean technologies, with an average market share of around 70%.⁴⁸

More than 30% of China's final energy consumption now comes from electricity, compared with just over 20% globally. Non-fossil energy exceeded oil's share of China's total energy consumption in 2024. Oil currently accounts for just 18.2% of Chinese consumption; the IEA projects that Chinese oil demand will plateau by 2027. This will be a structural peak, not a cyclical dip. Although the country imports natural gas, only a modest share is used for power generation.⁴⁹

Russian elites are worried that the emerging Chinese electrostate will have far less need for Russian fossil fuels, which would be a critical blow to their major source of global revenue. They are further concerned that China is doing little to help Russia's energy transition. They see China becoming the global center of gravity for clean-energy manufacturing and deployment, while Russia becomes structurally locked into the role of discounted fossil supplier.⁵⁰ "In essence," Sergey Aleksashenko notes, "Russia is trying to sell yesterday's gas into tomorrow's energy system."⁵¹

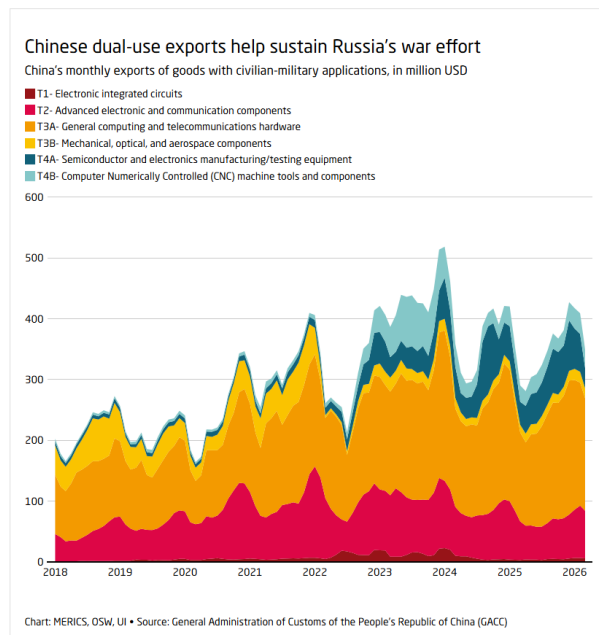
Still, despite Beijing's ongoing switch to renewables, China's economy is still heavily dependent on imported hydrocarbons and will be for years to come. Meanwhile, Chinese energy consumption is projected to jump, driven by the development of AI, while current energy supplies via Venezuela and the Strait of Hormuz could be disrupted for some time. Given these challenges, Russia remains Beijing's quickest and most obvious hedge.⁵²

Technological Cooperation

Russia's deepening commercial and financial entanglements with China have enabled the Kremlin to sidestep Western sanctions and given it access to critical capabilities in such areas as military and consumer electronics, AI, 5G, data storage and processing, cloud solutions, geospatial data, and satellite communications.⁵³

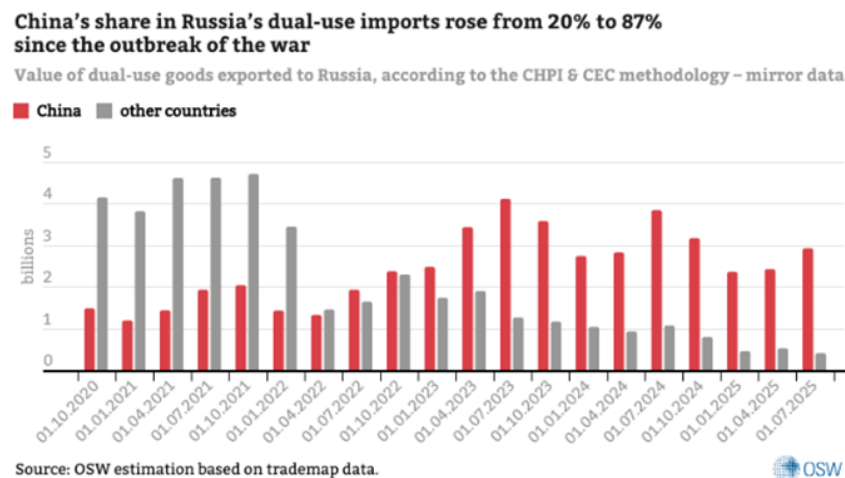
A significant share of Chinese exports to Russia is in goods identified by Western governments as dual-use items under the Common High Priority Items list. This list includes 50 goods subject to restrictive measures limiting Russia's access to technologies and other items needed to sustain its military production. Chinese exports to Russia of these items after 2022 compensated for the collapse of supplies from other major trading partners. Chinese exports of machinery and apparatus for the manufacture of semiconductor devices or electronic integrated circuits in 2024–2025 (combined) exceeded 2021 exports of those items by more than 550 times. Exports of transistors soared more than 300 times, and exports of instruments and appliances for aeronautical or space navigation jumped almost 400 times.⁵⁴

Figure 4.⁵⁵



Since the start of the invasion, the cumulative value of these Chinese exports amounts to nearly \$18 billion, including over \$4 billion in 2025. Chinese suppliers accounted for more than 85% of Russia's total imports in these categories. Moreover, these figures do not capture additional items not formally listed by Western authorities – such as turbojet engines – nor goods potentially re-exported via Central Asia. Taken together, these patterns underline the extent to which Russia's industrial sector has become technologically dependent on Chinese advanced goods, which now function as a critical lifeline for sustaining Russia's military output.⁵⁶

Figure 5.⁵⁷



Chinese firms are sensitive to the sanctions threat, as evidenced by a steep fall in Chinese exports of these goods during the first half of 2024, after the U.S. Treasury announced potential secondary sanctions against entities supporting Russia's military industrial base. Nevertheless, these flows are indispensable for keeping Russia's military-industrial base afloat.

Challenging Russian Sovereignty

Russia's deepening commercial and financial dependence on China is confounding Putin's deeply personal efforts to mitigate Russia's dependence "on foreign systems," which he says "is a matter of state, technological and value sovereignty."⁵⁸ Putin frames sovereignty in spiritual and existential terms: "Sovereignty is a very important thing, it must be inside, in the heart."⁵⁹ He maintains that "Russia must be sovereign, otherwise it will not exist," and that "ensuring technological independence is...of "special, *fundamental* significance."⁶⁰ Without technological sovereignty, he has said, "no other sovereignty is possible, because everything is based on it, it is the foundation."⁶¹

To realize his vision, Putin has pushed Russian officials hard to generate serial production of home-grown equipment, components, and innovations to secure "genuine technological self-sufficiency" -- goals which he codified into law in 2024.⁶²

These efforts have largely failed. Russia's Economic Ministry has acknowledged that Russia remains critically dependent on imports in areas at the heart of its war effort, including machinery, drone manufacturing and energy production, and that efforts to expand non-energy exports and build the infrastructure needed to sustain production and overseas supply chains have stalled. Self-sufficiency targets for several industrial sectors were abandoned because there were no domestic alternatives. In some cases, Russian officials even relabeled Chinese goods as Russian to achieve the targets.⁶³

Putin has kept up the pressure, complaining at the end of 2025 that officials had yet to fully assess Russia's "technological sovereignty," had failed to set out a path to "technological leadership," and that they needed "move faster."⁶⁴ Yet the government's plan to meet import substitution targets in critical industries by 2030 is wildly unrealistic. Goals include ensuring that 80% of companies in key sectors use Russian software (up from 46% in 2024) and boosting non-energy, non-commodity exports by two-thirds.⁶⁵

Chinese firms are making inroads into Russia's smartphone, laptop, wireless equipment, military electronics, data storage, processing and cloud sectors. China's DeepSeek has become Russia's most popular large language model.⁶⁶ Russia is also losing its historical advantage in advanced weapon, spacecraft, and nuclear technologies to China, further weakening its bargaining power. Russia's deputy Prime Minister Borisov summed up the situation: "As China turns into an industrial giant, it is less and less interested in our services."⁶⁷

Not only has the Kremlin traded dependence on Western vendors for dependence on Chinese suppliers, it is extending those dependences in key strategic areas such as AI. Despite Putin's repeated admonitions that Russia must lead the world in artificial intelligence, Russia is falling far behind in the AI race. Stanford University's Global AI Vibrancy Tool ranks Russia's AI ecosystem 28th in the world.⁶⁸

Faced with these realities, in 2025 Putin ordered Russia's government and Sberbank to work on AI research and development with China, and in April 2026 Moscow State University (MGU) created a closed artificial intelligence hub built around Putin's daughter Katerina Tikhonova, the director of the university's Institute of Artificial Intelligence. The project underscores the prominent role of Putin's family members in strategically important technology sectors. Tikhonova's AI projects are expected to deepen cooperation with China; plans are underway on

creating joint laboratories with the Russian-Chinese Shenzhen MGU-BIT University. The project is financially backed by billionaire Oleg Deripaska, founder of aluminum giant Rusal, and state-owned lender VTB Bank, which has begun to integrate graphics processors (GPUs) from China into its operations.⁶⁹

Since Chinese AI expertise is leagues ahead, such efforts are less likely to be joint development than Russia scrambling to access Chinese know-how. Chinese firms are likely to be interested primarily in acquiring either specific competencies or intellectual property, after which they are likely to want to proceed independently rather than be forced to share knowledge or be dragged down by technologically inferior partners. China has restricted exports of its frontier technologies, for instance Lonson processors, Beidou-Glonass chipsets, and Mavic drones.⁷⁰

At the same time that the Kremlin is deepening its dependence on China in strategic areas, it is becoming more protectionist to mitigate the downsides of its growing dependence in such non-strategic sectors such as passenger cars and consumer electronics. It sharply raised its recycling fee (scrappage fee) on imported vehicles by up to 85%, effectively targeting Chinese imports to protect domestic manufacturers. It also revoked selected certification permits for Chinese trucks. A new “technological levy,” slated to enter into force in September 2026, is intended to reduce electronics imports. The most immediate result of these measures, however, are higher prices for cars, computers and smartphones.⁷¹

Chinese Espionage and Reverse-Engineering

Bilateral cooperation has not prevented Beijing from engaging in extensive espionage and reverse-engineering efforts against Russia. Instances of Russian technology copied by China, some of which sparked scandals in Russia, comprise Russia’s Su-27, Su-30, MiG-21, and Tu-16 aircrafts; T-62 tank; AK-47 rifle; S-300 air-defense system; radar systems of the Sovremenny-class destroyer; aircraft engines; anti-aircraft missiles; and the analogs of the Pantsir air-defense system. It has recruited Russian scientists to transfer hypersonic, satellite, and marine technology secrets illicitly to Beijing, and enlisted Russian pilots and researchers in the procurement of sensitive information on strategic aviation.⁷²

Rare Earth Elements

Russian decision-makers are also concerned about growing Russian dependence on China for rare earth elements (REE). Russia claims to hold the world’s second-largest REE reserves, but it lacks mining, processing and refining capabilities on par with those of China, which accounts for 59% of global REE mining, 91% of global REE refining, and 94% of global REE magnet manufacturing. China is also Russia’s only foreign supplier of gallium and germanium and its largest supplier of antimony—materials needed for vital military electronics, including Russian missiles and drones.⁷³

Moscow is expanding domestic REE development as it seeks to reduce dependence on imports and China’s supply chain dominance. However, Beijing has avoided supporting REE development in Russia. It prohibits exporting REE separation and refining technology, even to its partners. Moscow’s most viable alternative options are Kazakhstan and Uzbekistan, but both have sought partnership with China, the United States and Japan instead of further integration with Russia.⁷⁴

Limits to the ‘No-Limits’ Partnership in Cyberspace

Russia and China seek to shape both the flows and the structure of cyberspace. They conduct cyberattacks and intentionally sow mis- and disinformation in other countries. Each shares elements of its disruptive playbook with the other. Each has built digital firewalls and surveillance panopticons at home and is exporting its model abroad. Each is manipulating the very architectural hardware of the Internet to reinforce its autocratic model of digital control.⁷⁵ China is also helping Russia align digital borders in ways that reinforce its geopolitical claims: Moscow has forcibly integrated occupied Ukrainian territories into its state-controlled “sovereign internet” (Runet), relying on Chinese equipment, primarily from Huawei, to supply the 6,000 mobile base stations that form the backbone of these new digital networks.⁷⁶

Moscow and Beijing have worked closely in UN forums to define norms and standards of digital governance. Artur Lyukmanov, the Russian President’s Special Representative for International Cooperation in Information Security, described China as Russia’s “primary like-minded partner in international information security.”⁷⁷ Russia has supported China’s efforts to move internet governance and standards-setting from non-governmental and multi-stakeholder organizations, such as the IETF and ICANN, to the UN’s state-led International Telecommunications Union (ITU), and to push for authoritarian standards in cyberspace. It has also supported China’s Global Data Security Initiative, which centers on absolute sovereignty of governments over all digital data within states’ territories, as opposed to the standard Western focus on the right to privacy. The two capitals do not always coordinate their initiatives, but they do not criticize each other publicly and usually settle on mutual authoritarian compromises when pushing back against Western-led efforts in such forums.⁷⁸

China and Russia have also aligned their foreign information manipulation and interference (FIMI) efforts. Both countries employ state-controlled media, cyber intrusions, content generated by artificial intelligence (AI), and social media influence campaigns — often reinforcing each other’s messages without formal coordination. Their presence and influence have grown in regions such as Africa, Latin America, and the Indo-Pacific. Whereas Moscow’s playbook aims primarily to sow confusion, befuddle, distract, disrupt, and deflect responsibility, Beijing’s playbook has typically focused on squelching criticism and promoting positive narratives of China abroad. Beijing has started to draw on Moscow’s playbook, with Kremlin support, by amplifying messaging from Russian propaganda ecosystems and questioning the legitimacy of democratic media outlets.⁷⁹

Russia and China share interests in expanding digital surveillance capabilities in countries around the world. Russian and Chinese companies are competitors in exporting surveillance technologies, though they operate at different scales and focus on distinct, often complementary, approaches to digital authoritarianism. China is the dominant global supplier of advanced AI-driven hardware, including facial recognition and smart city systems, while Russia specializes in lower-cost, high-impact digital influence and cyber-surveillance tools, such as information manipulation, social media tracking, and data analysis software.⁸⁰

Since the beginning of Russia’s full-scale invasion of Ukraine, Russian and Chinese cyber-attacks against Western democracies have sharply increased. Chinese and Russian cyber actors share malware and exploit kits, enabling more sophisticated attacks.⁸¹ Ukrainian officials report that Russia has deployed China-developed data-hijacking programs in attacks on Ukrainian institutions.⁸² State-sponsored hacker groups, such as Russia’s Turla (also known as Venomous

Bear and Snake) and China's APT10, otherwise known as Red Apollo, have carried out cybertheft and cyberespionage operations in scores of countries.⁸³ Russian and Chinese cyber actors have been implicated in attacks on energy grids, water systems, and other critical sectors in the United States and other countries.⁸⁴ Criminal platforms in each country fuel industrial-scale revenue generation, with their own sets of digital currencies and exchanges, production zones, tools supply, technical support, advertising, global distribution streams and virtual marketplaces.⁸⁵ China and Russia each recruit cybercriminals to carry out operations on their behalf, providing them with legal protection and resources in exchange for their services.⁸⁶

Despite these often parallel and sometimes aligned approaches, differences are also apparent. China remains a risk-averse and clandestine cyber threat actor that prefers to cover its tracks and wants to be seen as a responsible great cyber nation, at least by most states. Russia, on the other hand, has become aggressive and disruptive, prioritizing sabotage operations and exploiting vulnerabilities wherever it can. Russian and Chinese hacking groups generally are mistrustful of each other and do not tend to work together.⁸⁷

Russian and Chinese leaders signed agreements in 2009 and 2015 in which they agreed not to conduct cyberattacks against each other. Nonetheless, hacker groups linked to the Chinese government actively target Russian technology, defense and government actors. These intrusions spiked just after Moscow's full-scale invasion of Ukraine in February 2022 and have continued steadily since then. Publicly documented examples include infiltrations of Russian government, defense, aerospace, energy and tech firms by several Chinese cyber-espionage and hacking groups, including APT31, APT27, Slime19, Jewelbug, Mustang Panda, Sanyo and Tonto Team. Known incidents of Chinese state-affiliated cyber operations against Russia include attempts at stealing sensitive information related to nuclear submarines, drones, satellite communications, electronic warfare, aviation, and other defense fields, and from chemical and energy companies and financial institutions.⁸⁸

Russian intelligence officials have uncovered many of these schemes. A classified 2025 FSB counterintelligence document, obtained by *The New York Times*, revealed the extent of Russian concern. The report, which referred to China as an "enemy," highlighted Chinese efforts to tap Russian defense expertise and sensitive technologies and to learn from Russia's military experience in Ukraine. The FSB instructed its officers to intercept the "threat" and "prevent the transfer of important strategic information to the Chinese." Officers were ordered to harvest WeChat data to monitor people who might be in contact with "representatives of the PRC intelligence services" and to conduct in-person meetings with Russian citizens who work closely with China and warn them that Beijing was trying to take advantage of Russia and obtain military secrets and sensitive technologies. At the same time, officers were told to contain the risks posed by Chinese intelligence without causing "negative consequences for bilateral relations." Officers were warned to avoid any public "mention of the Chinese intelligence services as a potential enemy." Moscow's unwillingness to confront Beijing publicly is another example of the asymmetric nature of the partnership.⁸⁹

Less is publicly known about Russian penetration of Chinese digital networks, but Russian cyber operations are unlikely to pose a similar danger to China, given its fortified Great Firewall. According to Beijing-affiliated media, cyberattacks against China originate mainly in North America, South and Southeast Asia, and East Asia, rather than Russia, possibly indicating Moscow's restraint, which is unreciprocated by China.⁹⁰

Moreover, Moscow looks to China as a reference point for digital control, censorship and surveillance as it works to develop its own “sovereign internet” to control domestic web traffic and reduce reliance on global network routing. Russian top officials often invoke Chinese censorship methods as best practices that Moscow should learn and adopt. Russia’s Internet censors Roskomnadzor and Safe Internet League regularly seek counsel from the Cyberspace Administration of China on state surveillance and cyber-sovereignty protection. Russian authorities have concluded agreements with their Chinese counterparts on combating illegal online content, on web search and new media, and on state information security and information counter-warfare.⁹¹

Chinese firms supply Russian partners with relevant hardware and the two sides exchange views on good censorship practices. Moscow’s facial-recognition network mirrors the logic of Chinese ‘safe city’ programs, integrating biometric identification with law-enforcement databases and enabling automated monitoring of ‘risk groups.’ Russia’s new messaging and e-commerce platform called Max, run by tech giant VK and promoted by the Kremlin, is modeled on China’s WeChat. Every new smartphone bought in Russia now comes with Max preloaded, while popular messaging alternatives Telegram and WhatsApp are being blocked. Data-privacy activists say that the unencrypted new app will allow the Kremlin to see and hear everything its citizens do online. Max is now available for download in dozens of countries allied with Moscow.⁹²

Kremlin efforts have met with mixed success. Unlike Beijing, which rushed to implement its extensive domestic surveillance system in 1997 and has tightened it considerably since then, Moscow initially did little to impede Russian society’s deepening digital entanglements with the global World Wide Web. The Kremlin only began its efforts to control the architecture of the Russian internet following civil protests between 2012-2014, when Putin declared the internet to be a “CIA project” intended to engineer regime change.⁹³ Moscow supercharged its efforts following its 2022 invasion of Ukraine, when Putin ordered officials to “strangle” foreign IT companies still operating in Russia.⁹⁴ It has since been playing a cat-and-mouse game in which officials pass restrictive laws, throttle foreign apps, and seek to channel users to state-sanctioned sites, even as millions of Russians scramble to evade such controls. Roughly half of Russia’s internet users have downloaded VPNs to counter the Kremlin’s efforts to shut down apps like Telegram, which more than 100 million Russians use every month.⁹⁵ The Russian army has reportedly even banned the use of Kremlin-supported Max app by frontline soldiers because it is not secure enough. Moscow was compelled to grant soldiers a temporary waiver to continue using Telegram.⁹⁶

Russian society remains distrustful and more resistant to the normalization of Kremlin’s attempts at pervasive digital control than Chinese citizens, who have internalized autocratic digital governance norms through decades of ideological education and platform-level socialization. The Kremlin has no equivalent to the CCP’s long-term planning bodies or its ideologically disciplined bureaucracy. China’s system reaches into all facets of Chinese society, whereas Russia’s efforts are scattershot responses to crises rather elements of a systematic approach. Moreover, while Russia has imported elements of China’s approach, it is also concerned about becoming overly dependent on Chinese digital infrastructure, hardware, or platforms. Russia requires WeChat’s owner, the Chinese company Tencent, to store user data on Russian servers and to provide access to security agencies upon request. When senior economic official Maxim Oreshkin warned against “platform colonialism” and the danger of Russians becoming

“hostages” if they lack their own digital solutions, he had not just the West but also China in mind.⁹⁷

In sum, while Moscow is expanding its censorship and surveillance capacities, often with Chinese assistance, it is less likely to replicate China’s Great Firewall. Russia’s trajectory could align more closely with that of Iran, whose system includes “white lists” of approved sites, targeted outages to suppress dissent, and a domestic intranet under government control. Like Iran, Russia has implemented its controls inconsistently, and has failed to prevent mass societal evasion.⁹⁸

Topic III. In what ways do senior Russian decision-makers believe Russian interests diverge from those of China in Eurasia, the Arctic, Africa, and in multilateral groupings?

Russia and China in Eurasia

Russian decision-makers consider Central Asia to be part of their sphere of influence. They seek to keep the five post-Soviet countries, Kazakhstan, Kyrgyzstan, Tajikistan, Turkmenistan, and Uzbekistan, in Moscow’s geopolitical orbit. Russian pundits highlight the mutually beneficial nature of these relations while underscoring what they believe to be Russia’s naturally dominant role. Russian influence in Central Asia societies is considerable but slowly eroding, partly because of the war in Ukraine, partly because the countries of the region are cooperating more intently with one another and seeking to diversify their relations with external actors, and partly because of China’s rise. Russian leaders are acutely aware that they are losing influence in the region; an internal report concluded that Moscow would have to play the “long game” to keep Central Asian states in its orbit.⁹⁹

Russia’s war against Ukraine has caused Central Asian states to view Moscow as a less reliable and predictable partner. Military overstretch, economic pressure and diplomatic isolation have narrowed Russia’s ability to impose its preferences or to shape outcomes. Sanctions exposure, logistical disruptions and energy volatility have raised risks for Central Asian states tied to Russia through trade, labor migration and inherited infrastructure. This has prompted those states to diversify their relations. Expanding Trans-Caspian networks, the growing relevance of South Caucasus and Black Sea routes, and the widening footprint of China, Türkiye, the European Union and the United States are diluting Russia’s former dominance over transit and strategic access. At the same time, regional cooperation has deepened. The five Central Asian countries hold regular summits under the C5 format (and C5+1 with Azerbaijan), and have aligned more closely on bolstering transport corridors, trade, cross-border connectivity and addressing sanctions spillovers, energy and water stress, and infrastructure gaps.¹⁰⁰

The nature and pace of Russia’s declining influence vary by country and by issue. In the context of China’s rise, Russia continues to dominate in the spheres of security and culture, while its economic influence is declining fast.

Security concerns drive Moscow’s determination to assert its influence in Central Asia. Due to the difficulty in fortifying Russia’s southern border, destabilization in Central Asia would have immediate repercussions in Russia, be it in the form of Islamist infiltration, an increase in drug

inflow, a loss of control over gas and oil pipelines, or an upsurge in migrants and refugees. Moscow thus invests in maintaining and strengthening bilateral security ties. Russian military and research facilities in Central Asia include the Baikonur Cosmodrome rented from Kazakhstan, the Russian Joint Military Base in Kyrgyzstan, the 201st Russian military base in Tajikistan, which hosts 7,000 Russian troops, a second Tajik base near the Afghan border, and the many radar stations and testing locations it administers in the region. It conducts joint military exercises and trains Central Asian security personnel.¹⁰¹

Moscow has also sought to advance its regional security interests through the Collective Security Treaty Organization (CSTO) - a military alliance framed by commitments to defend other members against external aggression. In practice, the CSTO has been a weak instrument. The Central Asian member states of the organization have not recognized Russian claims to Ukrainian territories taken during the war, nor have they come to the aid of their Russian treaty ally. CSTO forces have only come to the aid of a member state once, and in response to internal strife, rather than external aggression, when they briefly intervened to support Kazakhstan's President Kassym-Jomart Tokayev during an episode of anti-government violence in January 2022.¹⁰²

The war in Ukraine is also affecting Russia's traditional role as the largest supplier of military materials in the region. As Russian arms sales have fallen, other countries, including China, have stepped in. Beijing has become a top provider of advanced military equipment—including combat drones, anti-aircraft systems, and drones—to countries like Uzbekistan, Tajikistan, and Kazakhstan. China holds regular joint military exercises with Tajikistan, Kyrgyzstan, and Kazakhstan. Central Asian states are also cooperating bilaterally with China in the areas of policing and internal security assistance. Chinese units are based in southeast Tajikistan, along the Wakhan corridor region of Afghanistan.¹⁰³

Russian leaders view China's increasing military activity in Central Asia with a mix of strategic tolerance and quiet apprehension. They are wary of China's increasing engagement with security services, surveillance technologies, and private security companies in Central Asia.

Central Asia's economic ties with China are expanding rapidly, often at Russian expense. In 2019, China surpassed Russia as the biggest trade and investment partner in all five Central Asian states. In 2025, China's regional trade with Central Asia exceeded \$100 billion, well beyond the \$45 billion that Russia has with the same countries.¹⁰⁴

Russia lost its monopoly over Central Asian states' energy export routes in the early 2000s, and natural gas and oil from Kazakhstan, Turkmenistan, and Uzbekistan can now be transported to China directly. Central Asian countries are also turning to China as an alternative partner for nuclear energy cooperation. China's CNNC has emerged as a strong competitor to Russia's Rosatom in nuclear projects in Uzbekistan and Kazakhstan, as both Central Asian states expand their nuclear energy programs. Kazakhstan has arranged for its first nuclear power plant to be built by Russia but its next two nuclear facilities to be built by China. Chinese nuclear reactors tend to be cheaper and can be built faster than Russian ones. China's policy of sharing nuclear technology and granting host countries full control over the nuclear fuel cycle is particularly attractive to Central Asian countries and gives China a competitive advantage over Russia's

model, which retains control over fuel supply and requires the repatriation of spent fuel for the duration of a plant's operation in non-nuclear states. However, concerns persist regarding China's comparatively lax safety standards, and the fact that China does not provide Central Asian states with a long-term, reliable solutions for radioactive waste management.¹⁰⁵

Connectivity

The commercial arteries connecting Russia and China are becoming strategically important to both countries as the Eurasian landmass is being reshaped by geopolitical competition and regional instabilities. Russia's main goal is to expand connections enabling the export of natural resources. China is primarily interested in the transit of goods to Europe through Russia and Central Asia. Both aim to be central players in an emerging Greater Eurasian economic security architecture, and each is testing the other's interests in the process. Bilateral cooperation has also become more complex since Russia's 2022 invasion of Ukraine: Russia needs railway capacities for its domestic needs and does not want connections to be used to supply Ukraine, and China has begun to hedge its bets -- espousing ongoing support for existing corridors with Russia while forging alternative connections that bypass it.¹⁰⁶

Moscow has focused on projects aimed to expand connections to East, Southeast, and South Asia, primarily to facilitate exports of energy and natural resources. These have included expansion of gas pipeline infrastructure to China, as already discussed earlier. They have also included efforts to expand the Northern Corridor, a set of land-based rail/road routes from China to Europe via Kazakhstan, Mongolia, Russia and Belarus, with a cargo capacity of over one hundred million tons, and the Northern Sea Route (NSR), a 5,600 km maritime route stretching from the Barents Sea to the Bering Strait.¹⁰⁷

Until 2022, up to 86% of overland freight transport from China to Europe passed through Russia via the Northern Corridor, which is also considered to be part of China's Belt and Road Initiative (more below). However, Russia's 2022 invasion of Ukraine and the ensuing sanctions disrupted the Northern Corridor as rail freight volumes plummeted.¹⁰⁸

The Kremlin has also sought to expand the NSR to increase exports of energy and other raw materials extracted in the Arctic and to provide a shorter connection to Asia than traditional maritime routes. The NSR has also suffered from sanctions and delays in the implementation of energy extraction projects in the Arctic (e.g. Arctic LNG 2 and Vostok Oil). Plans to expand the Arctic fleet (especially icebreakers), land infrastructure (ports) and navigation systems (launch of new satellites) are stillborn. Russia is still unable to ensure year-round operation of the eastern part of the route (from the Gulf of Ob).¹⁰⁹ Despite the government's ambitious plan to increase NSR transport to around 80 million tons by 2024, less than 37 million tons were transported in 2023 (about 3 million tons more than in 2021), of which only about 8% was transit transport. In 2023, Chinese shipping companies made 23 NSR voyages (compared to 14 in 2024). Only one went to western Europe; the rest served Russian ports.¹¹⁰

While China has expressed interest in helping to develop the NSR, actual Chinese involvement remains limited. The Kremlin treats the Arctic as an area of strategic importance for Russia's security and economic development. Russian authorities restrict the direct participation of

foreign investors, including Chinese ones, in projects in the region.¹¹¹ China, in turn, does not have technologies relevant to Russia's LNG sector and is not interested in sharing other advanced technologies with Russia. Despite these limitations, the two countries continue to explore further cooperation. In 2024 they established a bilateral subcommittee on the NSR to facilitate freight transport and modernize ports and logistics centers. This has not been accompanied by any significant funding.¹¹²

Another troubled route is the Russia-inspired International North-South Transport Corridor (INSTC), a multimodal transport route that runs along three paths through Central Asia, the Caspian Sea and the South Caucasus, connecting Russia to Turkey, South Asia and the Indian Ocean. The INSTC, which has long suffered from neglect and underinvestment, has become more important to Russia as its economic ties with Europe deteriorate and its trade with India, Iran and the Caucasus become more important. In addition, the INSTC's western route passes through Azerbaijan, where it intersects with the Middle Corridor (see below), thus offering Russia the potential to tap into both east-west and north-south trade flows. However, the INSTC is currently the least promising project due to difficulties in reaching agreements with the jumble of countries involved and the enormous costs associated with ensuring significant transport along this route. The Iran war has introduced additional uncertainties: in March, Israeli jets targeted Iranian-Russian trade along the INSTC. Currently, approximately 20 million tons are transported through this corridor (compared to approximately 14 million tons in 2022), mainly via the western route through Azerbaijan.¹¹³

The most significant connectivity initiative in Eurasia is the Belt and Road Initiative (BRI), China's flagship global program launched by Xi Jinping months after he came to power in 2012. China's contracts and investments with 150 BRI partners around the world amount to \$1.4 trillion, including 350 deals worth \$213.5 billion in 2025. Once a vehicle for massive infrastructure projects, Beijing has repurposed the BRI to help it dominate frontier sectors such as clean technology, securitize critical mineral supply chains, and relieve domestic overcapacity through aggressive export expansion. The Kremlin initially distrusted the BRI, fearing that it could undermine Russia's hegemony in Central Asia. However, in 2014, after the annexation of Crimea, the Kremlin actively joined the project as a way to generate revenue from transit fees.

Another significant connection is the Trans-Caspian International Transport Route, also known as the Middle Corridor, which consists of a network of interconnected road, rail, and sea routes that go from China through Kazakhstan, across the Caspian Sea, and onward through the South Caucasus into the Black Sea or through Turkey to southeastern Europe. Before 2022, shipments via the Middle Corridor constituted less than 1% of goods shipped between China and Europe. It has been a prime beneficiary of the disrupted Northern Corridor. Corridor usage increased by 89% in 2023 and 70% in 2024. The volume of goods transported in 2025 reached 5.2 million tons, 72% more than in 2023. Transit times now average 14–18 days, faster than the Northern Corridor's roughly 19-day benchmark.¹¹⁴

The Middle Corridor continues to suffer from limited Caspian port throughput, an aging and insufficient ferry fleet, multimodal bottlenecks, rail gauge breaks, persistent funding gaps, high transport costs, disparate tariff regimes, and unpredictable transit times. Governance by Corridor states is fragmented. Tensions in the South Caucasus, risks of instability within Corridor

countries, and vulnerabilities of critical infrastructure to sabotage or organized crime all raise concerns about long-term corridor resilience.¹¹⁵

Nonetheless, the Corridor is favored by China, is now benefiting from major investments by the EU, and could be boosted by the “Trump Route for International Peace and Prosperity” (TRIPP). International development institutions like the European Bank for Reconstruction and Development, the Eurasian Development Bank, and the Asian Development Bank are all involved in infrastructure upgrades. The World Bank estimates that by 2030 Middle Corridor trade volumes between Europe and China could triple and travel times be cut in half.¹¹⁶

The distinguishing feature of the Middle Corridor is that it bypasses Russia. Moscow’s 2022 invasion of Ukraine prompted the countries of Central Asia and South Caucasus to intensify their efforts to limit their transport dependence on Russia, diversify their trade corridors, and accelerate their cooperation with China.¹¹⁷

While Beijing is being careful not to provoke Moscow, it is developing the Middle Corridor as a hedge against overreliance on Russian networks. China has incorporated the Middle Corridor more explicitly in its BRI discourse and signed a number of new agreements with Kazakhstan, Kyrgyzstan, Turkmenistan, Uzbekistan and Georgia to support its development.¹¹⁸ The China–Kyrgyzstan–Uzbekistan railway, a 523 km line currently under construction and expected to be completed by 2028 will shorten the transit distance between China and Europe by more than 1,000 kilometers.¹¹⁹

Russian elites are conflicted about the Middle Corridor. Many see it as a geopolitical instrument explicitly designed to bypass Russia and as a commercially limited path that is a poor substitute for Russia-centric routes. At the same time, Moscow seeks to avoid openly politicizing the corridor in ways that would antagonize China or Central Asian partners. It wants to prevent corridor competition from eroding its regional influence and transit rents, prevent excessive dependence on any one corridor, and position itself as a central actor shaping what it hopes will be a broad, interlinked Eurasian transport framework.¹²⁰

Figure 6. Key Eurasian Corridors¹²¹



Balancing Interests and Aspirations in Central Asia

The longer Russia's war in Ukraine goes on, the higher the likelihood that Russia's security cooperation with Central Asia will be compromised, opening opportunities for China, Türkiye and other countries. Further development of the Middle Corridor is also likely to solidify China's commercial clout in the region, at Russia's expense. Nonetheless, both countries continue to prioritize their own bilateral relationship. Russia looks at China's presence in the region with a raised eyebrow, but not as intensely as in the Arctic. Concerns about Chinese "intentions" are largely expressed by Russian nationalists; Russian officials do not comment negatively in public on Chinese activities in Central Asia. China, in turn, has been careful not to antagonize Russia as it expands its web of economic and security linkages. Beijing's economic engagement remains bilateral, commercially driven and deliberately cautious, focused on access and delivery rather than regional stewardship. China seeks stability rather than order-building. It is intent on securing markets, transit routes and resources and largely avoids political or security entanglements. This restraint has allowed Beijing to accommodate a more pluralistic regional environment in which Trans-Caspian connectivity, Western engagement and stronger intra-regional coordination coexist alongside Chinese projects.¹²³

It is unlikely that the region itself will become a flashpoint in Russia-Chinese relations over the short- to medium-term; both are intent on deconflicting when their interests intersect. Russia has not yet discovered a way to halt the gradual erosion of its influence in the region. It seems unlikely that Russia has the means to strengthen its prominence in the region.¹²⁴

Sino-Russian Interactions in the Shanghai Cooperation Organization

Since its founding in 2001, the Shanghai Cooperation Organization (SCO) has remained the most significant Eurasian organization that includes both Moscow and Beijing. Russia's participation in the SCO highlights that Moscow is not internationally isolated, promotes counterterrorism cooperation in Eurasia, provides opportunities for economic coordination with other members, and advances the Russian government's project of building alternative international institutions to what it claims are Western-dominated structures.¹²⁵ In 2024, Putin affirmed the goal of "creating a new Eurasian architecture of cooperation, indivisible security and development...to replace the obsolete Europe-centric and Euro-Atlantic models that gave unilateral advantages only to individual states."¹²⁶

The Sino-Russian relationship is the foundational pillar of the SCO. It offers a framework within which Russia seeks both to cooperate with China and to monitor and constrain it, especially in the economic domain. Sino-Russian differences have been more visible within the SCO than in arguably any other prominent international organization. When Moscow and Beijing fail to have manage their differences within the SCO, they each often pursue their goals outside the organization, complementing or, more often, circumventing their SCO-related initiatives.¹²⁷

Beijing has always resisted transforming the SCO into a collective defense structure, preferring to keep the organization focused on countering non-military security threats, like terrorism, through intelligence-sharing, law enforcement partnerships, and economic rather than defense cooperation. The SCO's multilateral counterterrorism exercises are intended to enhance

members' interoperability and joint capabilities, showcase the organization's collective influence, and function as a form of Sino-Russian confidence-building.¹²⁸

Russian policymakers initially shared Beijing's position of excluding the SCO from traditional military issues, so it could preserve its dominant position on regional security questions. However, due to the deteriorating security situation in Afghanistan in the mid-2000s, the Russian government reversed course and favored endowing the SCO with defense functions and expanding ties between the SCO and the Moscow-led Collective Security Treaty Organization (CSTO). After PRC policymakers, along with some Central Asian governments, opposed Moscow's proposals, the Russian government redirected its energies to enhancing the capabilities and missions of the Collective Security Treaty Organization while downgrading the SCO's defense activities.¹²⁹

Moscow and Beijing have also differed over SCO economic initiatives. Beijing blocked Moscow's effort to create a SCO-wide payment and settlement system to accelerate financial decoupling from the West. It diluted Moscow's proposal to establish a SCO-wide energy mechanism, which it likely would have dominated, in favor of an inconsequential SCO energy dialogue. Moscow, in turn, hobbled Chinese proposals to establish a SCO-wide common market or free-trade zone, which would have helped Chinese goods displace traditional Russian markets in Eurasia. It also derailed China's proposal to create a Beijing-led multibillion-dollar SCO Development Bank to finance major infrastructure projects. Instead of escalating their differences within the SCO, both countries have chosen instead to pursue their objectives outside the organization. For instance, Moscow launched competing regional economic initiatives to lead a Customs Union and a Eurasian Economic Union, both excluding Beijing. China, in turn, has pursued bilateral deals and allocated more funds into its projects than Russia could ever hope to match.¹³⁰

Beijing-Moscow differences over how to expand the number of SCO members prevented the organization from growing for many years. These differences have narrowed as Moscow has elevated the strategic importance of cooperating with China within its overall foreign policy, and as the collapse of Moscow's ties with the West has substantially elevated Russia's dependence on Chinese diplomatic and economic support. As a consequence, SCO members agreed to grant full membership to India and Pakistan in 2017, Iran in 2023, and Belarus in 2024. It also established a large roster of Dialogue Partners, including Armenia, Azerbaijan, Bahrain, Cambodia, Egypt, Kuwait, the Maldives, Myanmar, Nepal, Qatar, Saudi Arabia, Sri Lanka, Türkiye, and the United Arab Emirates. Some of these countries will probably become formal SCO observers or full members.¹³¹

The Arctic

In August 2007, a Russian expedition descended in a pair of submersible vessels in the Arctic, more than two miles under the ice cap, and planted a Russian flag on the seabed at the North Pole. The dive was a symbolic move to reinforce the Kremlin's disputed claim to nearly half of the floor of the Arctic Ocean and potential oil and other resources there.

Inside the first of the mini-submarines to reach the sea floor were two Duma members. One of them, Artur N. Chilingarov, led the expedition to seek evidence reinforcing Russia's claim over

the largely uncharted domain. “The Arctic is Russian,” he proclaimed. That claim, which has no current legal standing, rests on a Russian assertion that the seabed under the pole, called the Lomonosov Ridge, is an extension of Russia’s continental shelf and thus Russian territory.¹³²

For two decades, Russia has asserted its right to dominate the Arctic, clashing with the four other littoral states—now all NATO members—over their respective claims to the Arctic’s territory and resources. Nonetheless, prior to 2022 the Arctic was seen as an area of low tension where Russia and other Arctic states cooperated in the Arctic Council and across various forums.¹³³ This all changed after the invasion of Ukraine; Russia was forced to withdraw from the Arctic Council and other related bodies. Today, the Arctic has become a critical arena where there is an evolving strategic competition among Arctic and some non-Arctic players, characterized by acute resource races and great power positioning. Climate change has exacerbated this competition by opening up new transportation and supply routes. Melting sea ice and thawing permafrost expand access to untapped resources and transport routes, and states are investing in infrastructure that blurs the line between commerce and strategy.¹³⁴

Xi Jinping first called China a polar great power in 2014. China then elevated its Arctic footprint in January 2018 when it proclaimed itself to be a “near-Arctic state.” Beijing’s interests in developing an Arctic identity were based partially on geography but also on its great power status and the specific “goods” it said it would be able to provide to the region in the form of its development policies and its economic and scientific prowess. It advocated for the construction of a “Polar Silk Road” linking China to Europe and looked to Russia to help boost its claims and influence there.¹³⁵

Since the full-scale invasion of Ukraine in 2022, Russia has increasingly cooperated with China in the Arctic, given Western sanctions on Arctic projects with Western corporations. Yet, as in other dimensions of Moscow’s ties to Beijing, there is also resentment against China encroaching on what is considered Russian territory and concern that China may take advantage of Russia’s isolation and advance its interests at Russia’s expense.

The Kremlin views the Arctic as vital to its national security, economic prosperity and global influence. It jealously guards Russian interests in its Arctic exclusive economic zone, which extends 200 nautical miles from its coastline. It also promotes the Northern Sea Route, a physical shipping lane that runs primarily through Russia’s exclusive economic zone and is a sub-section of the broader Northern Passage. The Arctic accounts for about 20% of Russia’s GDP, primarily through long-term gas exports. There are also vast untapped critical mineral and energy resources that Moscow controls but have yet to be excavated because of pending legal cases with Denmark and Canada.

Since 2024, Putin and Xi have reiterated their commitment to work together in the Arctic as part of their “Partnership Without Limits.” However, it is a cautious and haphazard partnership at best, laced with elements of rivalry, and tempered by the Kremlin’s wariness about long-term Chinese ambitions in the region, including concerns that China may eventually challenge its exclusive rights in the Arctic. There are signs of growing competition over access to and ownership of resources, questions of regional dominance, and control over the flows of goods, services and data that are the lifeblood of Arctic commercial activities.

While PRC scholars continue to discuss China as a “near-Arctic state” as well as other framings, the Chinese government tends now to focus on “new strategic frontiers” which include the polar,

and to refer to China as a “great polar power.” The CCP’s latest five-year plan contains no specific references to the Arctic or Antarctic; passages instead use the term “global polar domain” – an effort to characterize the polar regions as part of a global commons that is not the exclusive preserve of regional states, thus opening space for non-polar powers such as China to engage.

China is a major investor and consumer in the Arctic, acting as a crucial economic partner for Russia while pursuing its own interests in shipping and resource extraction. The Chinese companies CNPC and CNOOC each hold a 10% ownership stake in Arctic LNG-2, which is subject to comprehensive international sanctions. The Chinese also own almost 30% of Yamal LNG, which initially avoided sanctions. Moscow and Beijing signed a protocol in December 2024 to promote further investment and joint projects associated with Yamal LNG. The Russian Duma ratified the agreement in February 2026. This positions China to increase its stake in Yamal LNG, particularly after January 2027, when the EU’s ban on all LNG imports from Russia is slated to take effect. European countries have accounted for the lion’s share of Yamal LNG production; some of that could soon go to China.¹³⁶

China shares Russia’s interest in developing the Northern Sea Route, which is the primary channel for China’s Polar Silk Road -- Beijing’s broader strategic, diplomatic, and economic policy initiative to develop infrastructure and collaborate in the Arctic. The Polar Silk Road shortens shipping distances between Asian manufacturing hubs and European markets. It would bring significant economic advantages to China, lessening the time it takes for Chinese goods to reach Europe and lowering fuel costs.

Despite Russia’s concerns about Chinese intentions, it has few choices in cooperating with China in the Arctic. It depends on Chinese technology and funding to develop its Arctic resources, because of Western sanctions. It continues to work with Beijing, hoping to take advantage of China’s interest in the Arctic without allowing Chinese activities to undermine Russia’s Arctic primacy. For now, Moscow focuses on restricting Chinese activities in the Russian Arctic zone, as opposed to the Arctic as a whole.

Russia is determined not to allow differences over Arctic policy to derail its no-limits partnership with China, but it also faces pressure from the other Arctic littoral states, who seek to disrupt the Sino-Russian strategic partnership. For now, Moscow will ensure that nothing it does directly challenges its partnership with China, while at the same time seeking other partners for its Arctic development. India is becoming a more important Arctic partner in the shipping and resource spheres, and the UAE’s DP World is working with Rosatom to develop the Northern Sea Route and invest in Russian LNG projects. South Korea has legislated that its Busan Port must link up with the Northern Sea Route and will invest in that route.¹³⁷

Russia has signaled to the outside world that there are indeed limits to its partnership with China in the Arctic because it is determined not to lose its primacy in the region. It is committed to maintain its lead in the polar research community and has arrested some of its Arctic researchers on suspicion of spying for China. Nevertheless, it will become increasingly challenging for Moscow to maintain its leadership over Beijing going forward. The Arctic is undergoing rapid change, and the dynamics between Russia and China may change there, likely not to Russia’s advantage.

Africa

During the Cold War, the USSR, the United States and China competed for influence on the African continent after the UK and France divested themselves of their colonies. Moscow and Beijing supported rival national liberation movements and newly-independent countries. African countries complained about pressure from the Soviets and Chinese to join their respective camps during the most acute phase of the Sino-Soviet split. But Africans generally viewed both the USSR and China as supportive of their campaigns to decolonize. South Africans are particularly grateful to contemporary Russia as the successor to the USSR, which supported them in their struggle against Apartheid. Indeed, they speak of a “liberation debt” to Putin’s Russia as the heir to the Soviet Union.¹³⁸

After the Soviet collapse, Russia largely withdrew from Africa because it lacked the resources to stay there. Under Putin, however, interest revived, and in October 2019, Vladimir Putin hosted Russia’s first post-Soviet Africa summit in Sochi, with 43 heads of state or government in attendance.¹³⁹ Russia was back in Africa, he announced, and eager to do business there. Putin had been cultivating ties with a range of countries on the continent since he came to power. And Putin’s investment has paid off, as demonstrated by the reluctance of African countries to criticize Russia’s war against Ukraine and their refusal to impose sanctions on Russia. A second Russia-Africa summit was held in 2023 and a third is planned for 2026.

On the margins of the 2019 Sochi Africa summit, a participant told the author that Africans welcomed Russia back to the continent because they did not want to be dominated by China. China had already returned to Africa and had significantly increased its economic footprint there since the Soviet collapse, including building a port in Djibouti.

What does Putin’s Russia have to offer Africa? A range of political, military’ security, counterinsurgency and economic ties. Of course, the Wagner Group, under the late Yevgeny Prigozhin became active in the Central African Republic (CAR) and Mali. The Wagner Group’s involvement in CAR is illustrative of what Russia can do to nurture authoritarian regimes involved in conflict—and reap major financial benefits. The Private Military company Wagner began its involvement in CAR after the outbreak of civil war in 2012 but became a much more forceful presence after France withdrew militarily in 2016. Not only did Wagner give military and intelligence support to the government, its leader Yevgeny Prigozhin established two CAR-based gold and diamond companies. Wagner kept much of the profits but they were also kicked back to the Kremlin, which directly profited from these activities. Wagner repeated this profitable pattern in other African countries.¹⁴⁰ After Prigozhin’s mutiny and subsequent demise, the renamed Africa Corps remains active in the Sahel, as well as Libya, Burkina Faso and Niger.

Putin repeatedly presents Russia as the defender of African countries against the West’s neocolonialism, and reiterates that Russia was never a colonial power. This narrative finds resonance in countries in the global South, since they largely refuse to view Russia’s conquest and domination of its neighbors under the Tsars and Soviets—as well as Putin’s claims about Ukraine being part of Russia-- as a form of colonialism.

Sino-Russian cooperation in Africa remains limited and is primarily normative and ideational. Both countries oppose Western attempts to impose their values on African societies and both appeal to Africans by promoting themselves as the guardians of African sovereignty, as opposed to what they term Western interference in African societies. Both countries criticize Western

policies but, beyond the rhetoric, there is little substantive collaboration. Russia tends to support fragile governments and non-state actors in civil wars, whereas China prefers to back established governments. Its interests in connectivity are best served by stable governments.¹⁴¹

There is little public comment by Russian or Chinese officials about how they view each other's activities in Africa. However, the expert community in both countries has discussed these issues with considerable openness. A senior Russian official has described Africa as a theater of competition between the United States and Europe, on one hand, and between non-Western powers such as China, India and Turkey on the other, deliberately omitting Russia as engaging in great-power competition or part of a twenty-first century "Scramble for Africa." Prior to 2022, Russian academic discourse did feature Sino-Russian rivalry in Africa, predicting that this would only increase over time. Even after the announcement of the "no limits" partnership, Russian scholars claimed that Russian interests in Africa were primarily political, whereas Chinese interests were primarily economic. And they claimed that Russia and China were interested in expanding their influence in different countries. Russian experts now tend to downplay the growth of Chinese investments in Africa and deny that Russia and China are bound to clash in Africa.

Chinese commentaries echo Russia's anti-colonial rhetoric. They also link Russia's growing ambitions on the continent to the Russia-Ukraine conflict and Moscow's desire to push back against European sanctions by the French in countries like Mali or Niger, both of which threw the French out in 2023. While internationally-oriented Chinese commentaries speak positively about Russia's engagement in Africa, domestically-oriented commentary paints a much more negative picture of Russia's capabilities and intentions. It accuses Russia of "racist" views about Africa (echoing previous Chinese criticisms of Soviet views of Africa), arguing that Moscow's understanding of Africa is trapped in the past. They deride Wagner activities, reflecting Beijing's unease over the privatization of security. Chinese skepticism about Russia's activities in Africa has persisted since 2022.

Russia and China have collaborated on several policy initiatives in Africa. Russia provided the Sudanese military with much of its military hardware, enabling the regime of President Omar al-Bashir (who has been indicted by the ICC as a war criminal) to avoid international isolation, which was also a Chinese goal. Russia's joined with China in opposing NATO's 2011 intervention in Libya which resulted in Gaddafi's grisly death. In other instances, both countries have joined together to protect African autocrats from being ousted.

Since 2022, however, Russia's disruptive behavior on Africa has alarmed the Chinese. Russia has supported a number of military coups in the region, especially while Prigozhin and Wagner were operating. Prigozhin hailed the Malian coup leader Assimi Goita -- whom Wagner helped come to power -- as a warrior against the French plundering his nation. China has also condemned other coups in which Russia was involved, often because they challenge Chinese economic interests. This was true of the 2023 coup in Niger which threatened China's oil giant CNPC's investment to build a pipeline to link the Sahel to coastal West Africa.

Russia presents itself as a hedge for African countries who fear Chinese domination. In the case of Zimbabwe, Russia's political technologists helped steer the country away from its China focus under Robert Mugabe to a more pro-Russian policy once he left the scene. African elites increasingly see Russia as a counterweight to Chinese influence, despite the fact that Russia has less to offer them economically in terms of their development needs.

In sum, despite their joint commitment to creating a “post-West” African continent, Russia and China’s cooperation on the African continent is marginal. Russia may well feel that it is gaining an edge over China on a continent that is increasingly discomfited by China’s growing economic presence. While Russo-Chinese differences in Africa are unlikely to disrupt the broader Russian-Chinese alliance, they are a reminder that relations outside the strictly bilateral framework can cause frictions in the “no-limits” partnership.

BRICS+

In 2001, Jim O’Neill of Goldman Sachs published a report, “Build Better Global Economic BRICs,” coining the acronym for the four countries that, he claimed, in one decade would reshape the world economy—Brazil, Russia, India and China.¹⁴² Twenty-five years later, only two of the original countries have made rapid economic strides—China and India. The Russian economy has performed much more poorly. O’Neill himself has criticized the way in which BRICS has developed into a largely political club. “It has made the framework much more durable and has added to its longevity,” he says, but “The recent decision to expand has now become highly political and I am not sure what fruitful purpose it serves other than being a club that the U.S. is not a part of.”¹⁴³

Despite the failure of BRICS to develop into an effective economic grouping, Putin and Xi have managed to parlay the original concept into a grouping of countries that excludes the West and has now expanded to take in more countries from the Global South: South Africa, Egypt, Ethiopia, Indonesia, Iran and the United Arab Emirates. Russia and China each views BRICS+ as a vehicle to increase its respective influence in the Global South. Although in reality China has become the dominant country in the organization, Beijing is careful to treat Moscow as its equal in BRICS+ and endorse the illusion that Russia can lead.

The original four BRICS began coalescing as a political forum in 2005 at Putin’s initiative.¹⁴⁴ The group held its first stand-alone leaders’ summit in Russia in 2009. South Africa joined the group in 2011. While China has always been a proponent of expansion as a means of expanding its influence in the Global South, Russia was initially skeptical about further expansion so as not to dilute the group. Putin’s perspective changed after his full-scale invasion of Ukraine. With Western sanctions and the West’s moves to isolate Russia, expansion became much more attractive to Russia. In addition to the 2024 enlargement, 10 additional countries are now partners: Belarus, Bolivia, Kazakhstan, Cuba, Malaysia, Thailand, Uganda, Uzbekistan, Nigeria and Vietnam. So far, Argentina and Saudi Arabia have declined to join.

Russia’s current goals for BRICS largely center around its own economic needs, especially since 2022: creating an alternative payment system that bypasses the SWIFT, a BRICS credit rating agency independent from Western-dominant industry leaders, and a grain exchange that would enable Russia to trade one of its most important exports out of the dollar zone. These measures would facilitate Russia’s return to the global economy by bypassing Western financial and trade sanctions. However, BRICS expansion has made the achievement of these goals more difficult because of the need for consensus among all members—which was easier when there were 5, as opposed to 10, members. Russia has tried to push for the de-dollarization measure without achieving consensus, but this may not be accepted.

Power dynamics within the BRICS are unclear, not only because of the need for consensus, but also because BRICS deliberations take place behind closed doors. Leader-level discussions are a

black box and annual summits remain the main focus of institutional decision-making. Although one would assume that Russia's war with Ukraine has cost it leverage within the group, the opacity of the institution allows Moscow to maintain the façade of equal leadership with China.

So far, Beijing has taken care to maintain the illusion that Russia is a leader in the BRICS and the Global South. Xi has attended every Victory Day parade in Moscow since 2022 and, when Putin visits Beijing for high-level meetings, he is given pride of place in photographs with Xi. Xi understands the need to show respect to Putin—even though he also knows that Russia is not China's equal—because treating Putin publicly as an equal in bilateral and multilateral fora is a means to ensure the stability of the partnership. This enables China to fall short of endorsing Russia's war in Ukraine or its annexation of Crimea in 2014, although Beijing has not condemned Russia. Putin may also understand that Russia is indeed not China's equal, but the treatment he receives from Xi enables him to present himself to the world as the respected leader of a great power.

Although China is Russia's most important international partner, Putin has also focused on developing closer ties with other BRICS members since 2022. India has been an important partner for Moscow since Soviet times, and a top purchaser of Russian weapons. But it has become an even more significant partner for Russia since the war with Ukraine began, because it has been one of the top two purchasers of Russian oil. After the Trump administration imposed punitive tariffs on Indian goods and U.S.-Indian relations deteriorated, Putin visited Prime Minister Modi for a summit in December 2025. Russia has also put itself forward as a mediator between China and India in BRICS+ and other forums such as the SCO.

Russia has also pursued diplomatic outreach to some of the new BRICS+ members-- Egypt, Ethiopia and the UAE. These have advanced Russia's economic presence in Africa and the Middle East, as Russia has sought to instrumentalize BRICS+ membership for its own economic and political gain.

Russia and China in the United Nations

Since Russia launched its full-scale invasion of Ukraine, the Kremlin has worked to ensure that neither the UN General Assembly nor the Security Council can impede its ability to wage war. China, while abstaining on resolutions condemning Russia's war, continues to vote with Russia on other issues. Russia appears to have strategically conceded its position as China's junior partner in the UN. But it utilizes tactical divergences to maintain its influence in the organization. Its veto power in the Security Council ensures that the UN is powerless to halt its aggression against Ukraine, even though the war violates key elements of the UN Charter, such as respect for sovereignty and territorial integrity, commitment not to undertake aggression against other states and peaceful settlement of disputes.

Russia and China's voting alignment in the UN General Assembly and the Security Council has become a key element in the evolving strategic partnership. Both parties push the need for a "multipolar" world and both resent Western-dominated institutions. However, their alignment has weakened since 2018 and differences in the two countries' strategic priorities have become clear since 2022. Russia has narrowed its focus to prevent any attempt to interfere in its war against Ukraine, while China has expanded its engagement and influence across the full spectrum of UN institutions. Beijing-led global initiatives—particularly those connected to

China's sprawling Belt and Road Initiative-- dominate many UN discussions. Most non-Western countries, like Russia, tend to align with China on these issues.¹⁴⁵

There is evidence that Russia's concerns about China's growing influence in the United Nations are increasing. Since Moscow is engaged in an "axis of necessity" with China, it has no choice but to align with China against the West on many issues. Nevertheless, Russia has offset its dependence on China through strategic divergence. Russian voting patterns suggest that Moscow is both internally focused and risk-tolerant in its approach to Western control. This is particularly evident in its voting patterns on emerging technology and military oversight. In the area of humanitarian arms control, including provisions that regulate cluster munitions and landmines, Russia has consistently voted against restrictions. Beijing, conversely, has voted in favor of a number of key humanitarian conventions, including the Convention on Cluster Munitions and the Anti-Personnel Landmines Convention.

In 2024, Russia voted no and China voted yes on a resolution calling for responsible use of artificial intelligence in military operations. Differences are particularly evident on votes involving nuclear disarmament and the use of nuclear weapons. Russia consistently maintains the position that it has the right to strike first in face of either nuclear or non-nuclear aggression that threatens the Russian homeland. What would constitute a threat to the homeland is, however, left deliberately ambiguous. China, on the other hand, supports a no-first-use commitment, and reiterates that its nuclear posture is strictly that of a second-strike-only country.

For the Kremlin, the most critical area for Sino-Russian relations in the UN is the fallout from Russia's war against Ukraine. Russia is vulnerable to geopolitical and humanitarian intervention and oversight. After all, Russia violated the UN Charter when it invaded Ukraine and ideally the UN should have intervened to attempt to stop the war. But its veto in the Security Council has enabled it to avoid any UN intervention, even though it has been censured in the General Assembly. On five of the Ukraine-related resolutions condemning the invasion between 2022 and 2024, China abstained and Russia voted against. In February 2025, the General Assembly voted on two resolutions on the Ukraine war. Russia voted against both, while China abstained. However, China has joined Russia to vote against policies that addressed human rights regulation and oversight.

China and Russia are also largely aligned on issues that involve their joint commitment to push back against the United States and encourage smaller states and international organizations to support their aspirations for a "post-West" order and a "multipolar" agenda. Many UN members often vote in closer alignment with Sino-Russian positions, or abstain, rather than support U.S.-backed initiatives. This is especially true if one examines the votes of the BRICS, the BRICS+, the G-77 countries, and the SCO. For emerging economies and unaligned countries, alignment with the Sino-Russian positions through organizations such as the BRICS is a useful way to balance the need to push back against Western dominance without needlessly antagonizing the West, whose economic involvement they continue to need.

By joining with China on many issues, Russia is able to create a prominent partnership against Western power while solidifying its influence in much of the unaligned world. It appears as China's equal in these UN votes, even though in reality it is the junior partner. However, recent setbacks in Syria, Venezuela and Iran also highlight the limits of Russia's ability to deliver to its allies.

Nevertheless, although the BRICS' alignment with Russia is strong, no original BRICS member has voted with Russia on issues related to Russia's war against Ukraine. Most abstain. Brazil voted to condemn Russia in the first UN resolution after the war began and demanded that Russian troops withdraw from Ukraine. It has adopted a more neutral stance since then and has condemned sanctions against Russia.¹⁴⁶ China has abstained on most resolutions and has maintained its position as an advocate for conflict minimization and de-escalation. Moscow's ability to leverage the influence of the BRICS countries is, therefore, quite limited, including in the UN Human Rights Council. Russia's diplomatic partnerships with the unaligned world through the UN development pillar are strong, but they are confined to political and diplomatic engagement, not to investments. China, on the other hand, has leveraged its extensive trade, loan and investment ties to the unaligned world through the BRI to increase these countries' dependence on Beijing and use that to increase its international influence, something that Russia—with its limited economic involvement in these countries—has been unable to do.

The situation in the Security Council (UNSC) is somewhat different. At the Yalta conference in 1945, Roosevelt and Stalin agreed that the five permanent members of the UNSC should have veto power over decisions made, although Roosevelt was initially more skeptical about the veto than was Stalin.¹⁴⁷ Over the years, the USSR and then Russia has used the veto to reject policies favored by Western members. Today, Russia, as one of five permanent members with veto power, has the ability to prevent the UN from intervening in its war against Ukraine. China and Russia have largely aligned on most UNSC resolutions, including those on Ukraine. China has never endorsed Russia's invasion of Ukraine, but it has also never criticized it. The two countries have not cast opposing votes since the early 2000s. Through its veto, Moscow has been able to shield the war from international regulation. It uses the UNSC to assert its sovereignty-based narrative in defense of its invasion, enabling it to block intervention from other countries. China has abstained in UNSC votes on the Russia-Ukraine conflict, even as it underscores the importance of its strategic partnership with Russia. However, on other humanitarian resolutions addressing conflicts in Sudan, Gaza and Libya, China has expressed support while Russia has abstained.

Despite their alignment on many issues in the UN, there remain areas where Chinese and Russian positions are not congruent. China increasingly positions itself as a global mediator. It is able to do this because it has systematically pursued bilateral alliance-building, engagement with international organizations and its Belt and Road initiative. It positions itself as a facilitator in disputes between middle powers—for instance, between Saudi Arabia and Iran in 2023.¹⁴⁸ It also acts as a financier for development initiatives. It has cemented its position as a diplomatic and economic partner for countries in the Middle East, Africa and Southeast Asia. In this way, Beijing can maintain its image as a collaborative global leader while opposing the West through means that are not openly adversarial. Russia, on the other hand, acts as a disruptive power whose adversarial anti-Western position is on full display at the UN.

The shift in Russian-Chinese power relations since the end of the Cold War has been noticeable at the UN. In 1992, even in its weakened post-Soviet state, Russia was the stronger partner. Now it is the junior partner to China, weaker not only economically but in terms of diplomatic and military influence. Moscow continues to view Beijing as a strategic and necessary partner in the UN, but is wary of becoming too subordinate. The Kremlin's major focus today is to control the transition to a growing power gap between the two countries so as not to compromise its

international position. A comparison of the two countries' voting positions shows that China both competes and collaborates with the West, while Russia is more fully anti-Western.

It is clear that Russia views China as a necessary partner in the UN because China bolsters Russia's great power status, even if the disparity in real power between the two countries is growing.

So far, Russia's alignment with China in the UN has generally benefitted Russia, since they both remain committed to push back against U.S. power. The fact that China abstains on resolutions condemning Russia's invasion of Ukraine does not materially affect Russia's ability to continue its war. Moreover, China in reality is a major supporter of this war because of its purchases of Russian oil that fill Russia's war chest and its supply of components used in Russia's weapons. Beijing's votes in the UN are much less important than its material support for Russia.

Conclusion

Vladimir Putin's May 19-20 2026 visit to Beijing highlighted and confirmed the analyses made in this paper. On the positive side, Xi welcomed Putin with full state honors similar to those that he had bestowed on Donald Trump a few days earlier, thereby validating that Russia is, indeed, a great power and Putin is a world leader. The two countries signed 42 memoranda of understanding on both economic and cultural issues, and praised each other extravagantly. Both the symbolism and reality of the summit sent a message to Russia's partners in the BRICS, SCO and beyond that Russia remains an influential world power with whom it is important to deal.

On the other hand, it was well known that Putin's key goal in Beijing was to induce China—after two decades of negotiations—to sign on to the Power of Siberia 2 gas pipeline. China had finally signed on the Power of Siberia 1 after Russia's annexation of Crimea and the imposition of Western sanctions. At that point, the Chinese were able to drive a hard bargain for lower gas prices. Given Russia's loss of European gas markets and declining revenues from oil sales, the Kremlin views Power of Siberia 2 as essential for its future economic health. But Xi was not willing to sign the deal. The Chinese are holding out for lower gas prices and also a commitment to purchase lower volumes of gas, since China has alternative sources of gas imports and is pursuing an aggressive green agenda designed to lessen its dependence on imported hydrocarbons. The Kremlin tried to put a positive spin on these discussions, but the reality was clear: Russia is much more dependent on China economically than vice versa and is an economic supplicant in energy terms.

This paper has highlighted Russia's dependence on China in what is an increasingly asymmetric relationship. China has enabled Russia to continue its war against Ukraine, a war defined by Putin as existential for the Russian state—and for him personally. China provides political, economic and military support for the war effort and does not want to see Russia defeated. And China enables Russia to act as a great power on the world stage.

However, as the asymmetries grow, Russia is also concerned about the impact of China as a rising power with growing ambitions and, as leaked FSB documents attest, aggressive spying inside Russia.

There are key areas where Russia and China both cooperate and compete. Russia's increasing dependence on China has led to a Russian loss of sovereignty, despite Putin's frequent assurances that Russia is one of the few "truly sovereign" countries in the world. Russia and

China differ over nuclear doctrine and the use of nuclear weapons, and Putin's threats to use nuclear weapons against Ukraine or other European countries have earned Chinese rebukes. Although Russia and China have signed agreements not to engage in cyber activities against each other, there is evidence that both do. The two countries favor different and competing connectivity routes in Eurasia. And they compete in the Arctic and Central Asia, as well as Africa. China supports Russia on some, but not all, UN resolutions. And they may both favor a "post-West" world, but while Russia is a disrupter, China wants a global order with rules, even if it wants to bend existing rules to its preferences, and as it challenges basic security arrangements in East Asia.

Despite these differences, for the time being Russia has little choice but to accept its junior partner status not only for the duration of the Ukraine war but well beyond it. When Putin and Xi are no longer in power, these dynamics could change. But the fundamental discrepancies between a rising China and a declining Russia will persist.

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¹⁴⁷ U.S. Department of State, “The Yalta Conference, 1945,” <https://history.state.gov/milestones/1937-1945/yalta-conf>.

¹⁴⁸ Giorgio Cafiero, “A year ago, Beijing brokered an Iran-Saudi deal. How does détente look today?” Atlantic Council, March 6, 2024, <https://www.atlanticcouncil.org/blogs/iransource/iran-saudi-arabia-china-deal-one-year/>.