

# Putin and Xi's Unholy Alliance

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### Why the West Won't Be Able to Drive a Wedge Between Russia and China

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Just a decade ago, most U.S. and European officials were dismissive about the durability of the emerging partnership between China and Russia. The thinking in Western capitals was that the Kremlin's ostentatious rapprochement with China since 2014 was doomed to fail because ties between the two Eurasian giants would always be undercut by the growing power asymmetry in China's favor, the lingering mistrust between the two neighbors over a number of historical disputes, and the cultural distance between the two societies and between their elites. No matter how hard Russian President Vladimir Putin might try to woo the Chinese leadership, the argument went, China would always value its ties to the United States and to U.S. allies over its symbolic relations with Russia, while Moscow would fear a rising Beijing and seek a counterbalance in the West.

Even as China and Russia have grown significantly closer, officials in Washington have remained dismissive. “They have a marriage of convenience,” U.S. Secretary of State Antony Blinken told U.S. senators in March 2023 during Chinese leader Xi Jinping’s state visit to Moscow. “I am not sure if it is conviction. Russia is very much the junior partner in this relationship.” And yet that skepticism fails to reckon with an important and grim reality: China and Russia are more firmly aligned now than at any time since the 1950s.

The tightening of this alignment between Russia and China is one of the most important geopolitical outcomes of Putin’s war against Ukraine. The conscious efforts of Xi and Putin drive much of this reorientation, but it is also the byproduct of the deepening schism between the West and both countries. Western officials cannot wish this axis away, hoping in vain that the Kremlin bridles at its vassalage to Zhongnanhai or making futile attempts to drive a wedge between the two powers. Instead, the West should be prepared for an extended period of simultaneous confrontation with two immense nuclear-armed powers.

## **A Partnership with Limits**

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In a joint statement issued on February 4, 2022, Putin and Xi described ties between their two countries as a “partnership without limits.” That phrase won a lot of attention in the West, especially after Putin invaded Ukraine just 20 days later. Yet the deepening partnership was not born in February 2022. Following the bitter estrangement of the Sino-Soviet split that spanned the 1960s to the 1980s, China and Russia have become closer for several pragmatic reasons. Both sides wanted to make the territorial conflict between them a thing of the past, and by 2006, their 2,615-mile border had finally been fully delimited. Economic complementarity also drove them together: Russia had an abundance of natural resources but needed technology and money, while China needed natural resources and had money to spare and technology to share. And as Russia grew increasingly authoritarian with Putin in charge since 2000, Beijing and Moscow teamed up at the UN Security Council, using their power as permanent members to push back against many of the positions and norms advocated by Western countries, including the use of sanctions against authoritarian regimes and U.S.-led pressure campaigns in regional hot spots such as Syria.

China and Russia have also long shared a distrust of the United States, seeing Washington as an ideology-driven global hegemon that wants to prevent Beijing and Moscow from taking their rightful places in leading the world order and,

even worse, that aims to topple their regimes. The ideological and political compatibility between China's party-state and an increasingly authoritarian Russia has also grown. Leaders in Beijing and Moscow also refrained from criticizing the other's record of repression at home and treatment of national minorities—subjects routinely brought up by Western counterparts.

After the breakdown of Russian relations with the United States following Russia's annexation of Crimea in 2014, the Kremlin pivoted to the East to offset the effect of Western economic sanctions and make the Russian economy more resilient to Western pressure. Russia, whose defense industry survived the lean 1990s largely by selling arms to China, stepped up its exports of more sophisticated weaponry to its southern neighbor, such as S-400 surface-to-air missiles and Su-35 fighter jets, and invested in expanding pipelines, railroads, ports, and cross-border bridges that bring Russian natural resources to the Chinese market and Chinese imports to Russia.

As a result, the share of bilateral trade between the countries in Russia's overall trade jumped from ten percent before the annexation of Crimea to 18 percent before Putin's full-scale onslaught against Ukraine in 2022. The EU remained a more important partner for Russia, however, accounting for 38 percent of the country's trade, as well as being the country's largest investor and technology provider and a key destination for oil and gas exports. As for China, Russia accounted for only 2.5 percent of its trade in 2022, barely scraping into the ranks of its top 10 trading partners. China has counted its commercial, financial, and technological ties to the United States and Europe as far more important for the dynamism of the Chinese economy than its equivalent ties to Russia.

This helps to explain why, after Putin's invasion of Ukraine—which by many accounts Beijing had not expected—China tried to sit on the fence. It maintained ties with Russia, seized the opportunity to buy cheap Russian oil (as did other fence sitters, including India), and did not directly criticize Russian aggression. At the same time, it refrained from supplying Moscow lethal aid except for occasional small shipments of gunpowder and other war-related materials, formally supported Ukrainian territorial integrity, and did not engage in gross violations of Western sanctions—although several Chinese companies were put under U.S. and EU sanctions in early 2024 for shipping banned goods to Russia.

## The Great Quantitative Leap

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Despite Beijing's initially cautious approach, most available data points to a much more robust relationship between China and Russia developing in the two years since the invasion. In 2022, bilateral trade grew by 36 percent to \$190 billion. In 2023, it grew to \$240 billion, surpassing the \$200 billion mark in November, a goal that Xi and Putin initially intended to reach in 2025. China has imported energy commodities worth \$129 billion—mostly oil, pipeline gas, liquefied natural gas, and coal—that account for 73 percent of Russian exports to China, as well as metals, agricultural products, and wood. At the same time, China has exported to Russia goods worth \$111 billion, dominated by industrial equipment (around 23 percent of exports), cars (20 percent), and consumer electronics (15 percent).

Western export controls and the increased focus of Western capitals on the enforcement of sanctions have meant that Russia has no other long-term option than to shift to importing Chinese-manufactured industrial and consumer goods. As a result, sales of Chinese industrial equipment jumped by 54 percent in 2023 compared with the previous year, and sales of Chinese cars nearly quadrupled, making Russia the largest overseas market for Chinese automobiles with combustion engines. Hidden in these figures are Chinese-made items that directly boost the Russian military machine, including growing exports of chips, optics, drones, and sophisticated manufacturing tools.

China and Russia have grown notably closer in the critical area of security and military cooperation. Even amid Russia's war of aggression, China's People's Liberation Army has increased the number of joint activities it performs with the Russian military. In September 2022, despite significant problems on the frontlines in Ukraine, Russia conducted a strategic exercise in its Far East to which China sent 2,000 troops. A few months later, in December, the Chinese and Russian navies held their annual exercise, this time in the East China Sea. In 2023, Beijing and Moscow held three rounds of naval exercises, and in 2022 and 2023, they conducted four joint patrols in Asia with nuclear-armed bombers. These activities still clearly lack the breadth and depth of the joint drills between the United States and its allies in Europe and Asia, but the Chinese and Russian militaries are undoubtedly deepening their interoperability.

That closeness is reflected in diplomacy as well. Since the war in Ukraine, in-person meetings between Russian and Chinese elites have increased markedly. The Kremlin and Zhongnanhai have worked together before, but personal bonds were rare, with the exception of that between Putin and Xi. Now the two

presidents have made a point of encouraging their top officials to work together and to get to know each other. Since Xi's state visit to Russia in March 2023, Russian Prime Minister Mikhail Mishustin and senior members of his team have traveled to China twice, in addition to Putin's own trip to Beijing in October. Throughout 2023, many senior Russian officials and CEOs of the largest state-owned and private companies shuttled to and from China. Senior Chinese leaders—especially those from the military and security sectors—have also made trips to Russia. Russian Foreign Minister Sergei Lavrov is currently in Beijing for talks with his Chinese counterpart Wang Yi. It is notable that this traffic is mostly one-sided—senior Russian officials and business leaders are going to China much more frequently than their Chinese counterparts go the other way, a clear indication of Russia's desperate need for China. The one exception is the military-security domain, where the visits of high-ranking officials have tended to be symmetrical and reciprocal.

Beyond professional ties, connections to China are becoming increasingly important for Russian elites in crafting futures for themselves and their offspring. Most of these figures are now under Western sanctions, with the possibility of keeping their wealth in the West or sending their children to the United States or Europe for education foreclosed. The top Chinese and Hong Kong universities, meanwhile, are ranked much higher than similar institutions in Russia. There is growing anecdotal evidence that for the first time in Russian history, members of the Russian elite and their children have started to learn Mandarin.

The overall warming of attitudes to China is reflected in opinion polls, too, including recent data produced by the joint efforts of the Carnegie Endowment and the Levada Center, the independent Russian polling organization. At the end of 2023, 85 percent of Russians viewed China positively, whereas only six percent had a negative opinion of the country. Nearly three-quarters of Russians do not believe China is a threat to them—against around a fifth of Russians who think China is a threat. Over half of Russians now want their children to learn Chinese, a stunning development. More than 80 percent of people still want their kids to learn English, but the number of people interested in Mandarin is rising rapidly. The most China-friendly attitudes are recorded in the Russian Far East, a region that shares a border with China and is most exposed to the country in day-to-day life. This generally positive public disposition to China has allowed the Kremlin to enter a closer economic, technological, and political embrace with Beijing than ever before.

## A Friend in Need

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Following the full-scale invasion of Ukraine in 2022, war has become the organizing principle of Russian domestic, economic, and foreign policy. The Kremlin now assesses every relationship with a foreign power through a lens of three essential considerations: whether this relationship can help Russia directly on the battlefield in Ukraine, whether it can help to sustain the Russian economy and circumvent sanctions, and whether it can help Moscow push back against the West and punish the United States and its allies for supporting Kyiv.

Russia's relationship with China emphatically checks all three boxes. Russia's cooperation with China has to a large extent enabled Putin to continue his aggression against Ukraine. Beijing is not providing direct lethal aid to Moscow, but China's indirect support for the Russian war effort is indispensable. It includes the supply of commercial surveillance drones, Chinese-made computer chips, and other critical components used by the Russian defense industry. On the economic front, Putin's war chest relies heavily on revenue from Chinese purchases of Russian exports. The clearance of payments in the Chinese yuan keeps the Russian financial system afloat, and imports of cars, electronics, and other consumer goods keep shops well stocked and ordinary Russians quiet.

More telling, however, is Russia's decision to firmly align with China in its geopolitical contest with the United States. Before the war, some voices in the Kremlin privately urged caution and advised against blindly rushing into China's arms. The fragmentation of global order, skeptics warned, could lead to China's emergence as a hegemon in its neighborhood and the most potent power in Eurasia—with Russia playing the role of a subservient vassal for many years to come. Accordingly, before February 24, Russia tried to guard its own autonomy by maintaining at least some balance in its relationships with the U.S.-led West and China, although the anti-Western tilt in Moscow's policy became increasingly pronounced after Putin formally returned to the presidency in 2012.

The full-blown invasion of Ukraine has destroyed that precarious balance once and for all. With the West helping to kill Russian soldiers and waging an economic war against Russia, it is no longer possible for the Kremlin to maintain ties with the United States and its partners in Europe and Asia. Throughout the war, Putin has reiterated that Moscow's true enemy is not Ukraine but the West, which he claims seeks to weaken and dismember Russia. Helping China undermine U.S. global dominance is thus an important Russian goal because it can hasten victory in the war against the West that the Kremlin believes it is fighting. This change in attitude explains Moscow's desire to step up military

and technological cooperation with Beijing, as does China's growing leverage in the bilateral relationship—Russia is having a hard time resisting China's requests to share sensitive technology. Integrating Russia's economy, brainpower, and military technology into a Pax Sinica, a Chinese-led order with Eurasia at its geographic heart, is the only way Russia can sustain its confrontation with the West.

Unsurprisingly, this shift has only exacerbated the asymmetry that characterizes Sino-Russian relations. As a larger and more technologically advanced economy that maintains pragmatic ties with the West, China has stronger bargaining power and many more options than does Russia, and its leverage over its northern neighbor is growing all the time. Russia is now locking itself into vassalage to China. A couple of years down the road, Beijing will be more able to dictate the terms of economic, technological, and regional cooperation with Moscow. The Kremlin is not blind to that prospect, but it does not have much choice as long as Putin needs Chinese support to fight his war in Ukraine, which has become an obsession.

To be sure, vassalage to China will not necessarily constitute full and unconditional subordination. North Korea, which depends on Beijing for nearly every aspect of its security and economy, has some maneuvering space when it comes to its giant neighbor, and Pyongyang can sometimes make moves that upset Beijing—for example, when North Korean leader Kim Jong Un ordered the assassination in 2017 of his half-brother Kim Jong Nam, who was living under de facto Chinese protection. Russia is much more powerful than North Korea. No matter how much it needs Chinese support, it will not simply become China's quiescent and obedient servant.

Putin likes to rationalize his fateful choices by looking to historical analogies. Late last year, he referred to the thirteenth-century prince Alexander Nevsky, who ruled multiple principalities in what is now modern Russia, Belarus, and Ukraine as a vassal of the Mongol empire that at the time, ironically, also included China. Nevsky is lionized in Russian history as the leader who repulsed several attacks from the west, notably his defeat in 1242 of the Livonian Order that sought to spread Western Catholicism into regions where Eastern Orthodoxy was predominant. Putin sees himself following in Nevsky's footsteps, defying the West even as he defers to the East. "Prince Alexander Nevsky traveled to the Horde, bowed to the Khan and obtained a Khan's edict for his reign, primarily to be able to effectively resist the invasion of the West," Putin remarked in November 2023. "Why? Because the Horde, arrogant and cruel as it was, never threatened our greatest treasure—our language,

traditions, and culture, something the Western conquerors were eager to suppress.” The parallels are clear: the Russian ruler today is ready to tolerate vassalage to a power that does not threaten Russian identity and does not interfere too much in domestic affairs in order to push back against the West, which Putin and his ideologues portray as decadent and a mortal threat to traditional Russian values.

For its part, China has also come to see Russia as part of a fundamental geopolitical realignment. Going into 2021, Beijing had reasons to hope that its relations with the United States—the most important bilateral relationship of the twenty-first century—would be back on a predictable trajectory after the disruptive presidency of Donald Trump. Although China could not expect a comprehensive *détente*, it hoped for a healthier mix of competition and cooperation between the two most powerful countries in the world. Not only did Chinese decision-makers know the team of experienced foreign policy operators in the new White House, but Xi’s personal relationship with Biden dated back to the then vice president’s visit to China in 2011. But Beijing’s hopes were dashed when Biden retained much of Trump’s hawkish China policy, which involved strengthening military partnerships in the Indo-Pacific and limiting China’s access to cutting-edge U.S. technology as much as possible. Unforeseen developments, such as U.S. House of Representative’s Speaker Nancy Pelosi’s visit to Taiwan in 2022, have also convinced Beijing that China’s confrontation with the United States is bound to deepen, regardless of who occupies the White House.

This realization shapes how China thinks about its relationship with Russia. Following Putin’s invasion of Ukraine, Beijing made sure to ascertain the United States’ red lines and largely tried to adhere to them. However, as Xi discovered in October 2022 after Biden authorized far-reaching U.S. export controls targeting China, such a cautious approach will not stop Washington from trying to constrain Beijing. Throwing Putin under the bus was never an option for Zhongnanhai, since China is afraid of potential instability in Russia and the prospect of a pro-Western regime installed in the Kremlin should Putin abruptly leave the political scene. And if a protracted confrontation between China and the United States is inevitable, Beijing needs all the partners it can get, since the United States enjoys a huge advantage in its large network of resourceful allies.



## Back-to-Back in Eurasia

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No other power can bring as much to China's table as Russia, particularly right now. Russia's abundance of natural resources—not just oil and gas but also metals, uranium, fertilizers, wood, agricultural goods, and water—can help feed the Chinese economy. The problem for Russia, of course, is that this trade with China will increasingly occur with prices dictated by Beijing and payable in yuan. In the meantime, this flow of Russian resources boosts China's energy and food security while decreasing its dependency on vulnerable maritime routes such as the Malaka Strait, which is patrolled by the U.S. Navy. It also increases the competitiveness of Chinese manufacturing by lowering energy costs. Although the Russian market is much smaller than the U.S. or EU markets, it is still sizable and increasingly hungry for Chinese products. Russian sales are becoming ever more important for Chinese manufacturers, given unstable domestic demand in China and decreasing exports to traditional markets in the West. Moreover, since 70 percent of Chinese trade with Russia is settled in yuan, Beijing can treat the trade relationship as a flagship project for its currency's internationalization. Indeed, in November 2023, the yuan's share of global trade reached 4.61 percent, according to SWIFT data, its highest level ever.

Russia also has some advanced military technologies that China still needs, despite the overall superior sophistication of Chinese defense manufacturing. These include S-500 surface-to-air missiles, engines for modern fighter jets, tools for nuclear deterrence such as early-warning systems, stealthier submarines, and technologies for underwater warfare. Despite an exodus of talent following the invasion of Ukraine, Russia still has some brainpower, particularly in information technology, that China is interested in tapping.

Military-to-military cooperation with Russia is an important asset for China. There is still potential for the two countries to step up their intelligence sharing, conduct joint cyber-operations to steal sensitive Western government or commercial data, and coordinate their influence operations, including disinformation campaigns. So far, Russia and China have not really worked in tandem on the disinformation front, instead spreading similar narratives in parallel—but a combined approach could well take shape as the governments grow ever closer.

Moscow and Beijing do not want to sign a formal military alliance, as senior officials on both sides have reiterated multiple times. Neither wants to have a legal obligation to fight for the other and be dragged into an unnecessary

conflict. Still, two large nuclear powers that are on friendly terms standing back-to-back on the giant Eurasian landmass is a major headache for Washington. With the collapse of global nuclear arms control regimes and China's rapid nuclear buildup, U.S. strategists will face tough choices about resource allocation: the United States will need to develop a strategic nuclear force that can at the same time deter two partnered rivals with vast nuclear arsenals. A de facto nonaggression pact between China and Russia, and the countries' shared perception of the United States as an enemy, could lead to increased coordination between the European and Asian theaters, further stretching U.S. resources and attention. If, for example, China decides to make a move in the Taiwan Strait, Russia could simultaneously stage a provocative large-scale military drill in Europe, helping China by straining U.S. capacities to respond.

"There are changes happening, the likes of which we haven't seen for 100 years. Let's drive those changes together," Xi told Putin in parting at the end of his state visit in March 2023. The Russian leader eagerly agreed. Beijing's and Moscow's actions are indeed driving some profound changes to the global order, but these are not necessarily informed by careful strategic plans and well-articulated visions. Putin's anti-Western rhetoric that defines his invasion of Ukraine both as a rebellion against U.S. hegemony and "neocolonial practices" and as a bid to build a "more just multipolar world order" fails to convince the countries of the diverse global South (a group Putin grandiosely claims to represent), many of which look askance at Russia's blatant disregard for Ukraine's sovereignty and international law. The problem for the West is that many countries perceive its leader, the United States, to be just as cynical as Russia, thanks to Washington's checkered legacy of interventionism and selective respect for international law. Recent U.S. and European support for Israel in its war in Gaza, which is seen to flout some international norms, has only reinforced that perception.

Beijing's hypocrisy and the distance between its rhetoric and deeds are also plain to see. China's muscular assertion of its maritime claims in the South China Sea against the Philippines, for example, flies in the face of Beijing's claims that it respects international law, including the UN Convention on the Law of the Seas, and wants to solve territorial disputes with its neighbors through peaceful means. Xi and Putin are fond of invoking "the indivisibility of security," as they did in their joint statement on February 4, 2022, as a call to the United States to take the security concerns of others seriously, but that seemingly principled insistence is belied by Russia's total disregard for Ukraine's security concerns and China's bullying of its neighbors.

Hollow words do not change how the real world operates. Nor does the much-touted expansion of organizations such as the Shanghai Cooperation Organization or the multilateral grouping BRICS alter the international order by itself. What has had a real and durable impact on the order is the fact that in the last two years, Beijing's and Moscow's dealings have clearly demonstrated the limits of Western coercive power and provided a viable alternative to countries seeking to hedge against dependence on Western technology and the U.S.-dominated financial system. Russia is on its way to replace near total reliance on the West with reliance on China; it stayed afloat and has been able to wage an expansive war against a large country backed by NATO. Other countries wary of dependence on the West now see how Beijing can be a ready source of technology and payment settlement mechanisms, as well as a giant market for commodities producers. This is the most significant contribution of the Chinese-Russian alignment to the remaking of the global order.

## **No Reverse Kissinger**

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Indeed, the deepening of this partnership is one of the most consequential results of the Ukrainian tragedy. Moscow and Beijing may never sign a formal alliance, but the evolution of their relationship in the years ahead will increasingly affect the world and challenge the West.

To come to terms with this development, Western policymakers should abandon the idea that they can drive a wedge between Beijing and Moscow. Under Trump, the National Security Council entertained the idea of a "reverse Kissinger" approach of engaging Russia, the weaker partner, but to no avail. Whereas former Secretary of State Henry Kissinger courted communist China during the Cold War by offering Beijing a normalization of ties with the United States, U.S. officials cannot extend a deal of that sort to either Moscow or Beijing at this point. Any hopes of peeling them away from each other are nothing more than wishful thinking. Certainly, the Sino-Russian relationship is not without its strains, and existing tensions may be exacerbated as China grows more confident and is tempted to start bossing around the Russians in a more heavy-handed way—something that no ruler in Moscow would take lightly. For now, however, Beijing and Moscow have demonstrated a remarkable ability to manage their differences.

If the China-Russia tandem is here to stay, Western leaders must build a long-term strategy that will help maintain peace by accounting for all the ramifications of having to compete with China and Russia simultaneously. For a start, the West will need to find the right balance between deterrence and reassurance

with Moscow and Beijing to avoid dangerous escalatory situations that could arise from accidents, misperceptions, and miscommunication. Western governments should consider the second-order effects of the coercive economic measures they have applied to Russia and China and how retaliatory countermeasures further erode the fabric of globalization. And while they should not tolerate Russian and Chinese disinformation and attempts to subvert the functioning of international institutions, Western countries should seek to make some of these institutions, such as the United Nations and its related agencies, functional again even with Beijing and Moscow on board. When considering how to protect European and Asian security, rein in climate change, govern new disruptive technologies such as artificial intelligence, and address the challenges facing global financial architecture, Western policymakers must now reckon with the reality of an increasingly resolute Sino-Russian axis.

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