

NKK/SCEEUS REPORT
NO. 4

Future scenarios of Russia-China relations: not great, not terrible?

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25 September 2024



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Executive summary

The future of Russia-China relations will have a decisive impact far beyond the borders of the two authoritarian partners. How Moscow's and Beijing's strategic, political, economic and military ties develop will affect security and prosperity in Europe and the Indo-Pacific, and on the global stage in the intensifying battle between democracy and autocracy.

At the same time, the trajectory of their relationship in the short, medium and long term is not set in stone and will depend on numerous factors inside, between and beyond Russia and China. These will include structural bilateral factors that either enable or limit stronger relations, as well as external factors in both the European and the Indo-Pacific theatres.

How these various factors will develop and interact across different timeframes remains an open question. This report identifies three overarching scenarios for the future of Russia-China relations, as well as their development paths, likelihood and implications:

- **The first, most likely, scenario based on current trends is a *continuation of the status quo*** whereby relations strengthen but face clear limits and challenges. China continues to prop up its junior strategic partner Russia while the West remains disunited on how to handle Beijing.
- **The second scenario, seen as more likely in the long term, is a *worsening of relations*,** in which China prioritizes ties with the West and distances itself from Russia. A faltering Russian economy and war effort makes this scenario the best for the West and the worst for Russia.
- **The third scenario, which appears least likely from current trends, is *significantly improved ties*,** involving a closely aligned strategic or full-blown military alliance. China abandons its balancing act and provides direct military aid to Russia, strengthening the global autocratic bloc. The silver lining for the West could be a China with less room for manoeuvre.

The West must plan for this full range of possible outcomes across domains and their impacts. Crucially, western policy choices will play a vital role in the future development of Russia-China ties. They must therefore aim to affect the outcome in an optimal direction for western interests:

- **Accept, face and prepare for a long-term joint Russia-China threat.** This global strategic partnership will not go away, cannot be "solved", and must be managed systematically.
- **Build capacity to simultaneously deter and counter Russia and China in both theatres.** The defence of Taiwan starts in Ukraine, as threats, resources and strategies are interconnected.
- **Strengthen Europe's capacity to secure Europe.** Countering both adversaries will require the EU to upgrade *both* its strategic culture *and* its military and defence-industrial capacity.
- **Transatlantic unity and dialogue.** US-European alignment on framing and countering the Russia-China threat must be combined with dialogue on handling differences on China policy.
- **Understand and exploit the limits of Russia-China alignment.** The West must leverage the many areas and issues where Moscow and Beijing diverge.
- **Maximize the cost of China's support for Russia's war.** Pressure on China works and the EU must follow the US lead on credible secondary sanctions implementation.
- **Counter the Russia-China axis globally.** Shore up allies east and west, fight Russian-Chinese global influence and improve relations with middle powers.

Introduction

The Russia-China relationship has grown quickly and significantly since Russia's full-scale invasion of Ukraine and ties are now [closer](#) than ever in many areas. As Russia has become increasingly isolated, Chinese [political](#), [economic](#) and [military](#) support has been crucial for bolstering Russia's struggling economy and long-term war efforts. In addition, Russia's war against Ukraine has brought about a significant strengthening of strategic coordination and alignment between Russia and China on the global stage.

However, the war has also exposed and exacerbated the many [limits](#) and challenges in relations. The two countries have increasingly different strategic and geopolitical ambitions, means and prospects. While they share many vital views, they are separated by several others. In the areas of political, economic and military cooperation, there are grave limitations. A fundamental issue is growing inequality, where the distorted balance of power challenges Russian sensitivities and allows China to exploit potential advantages.

How Russia-China relations develop in the future will have a decisive impact far beyond the borders of the two authoritarian partners. Moscow's and Beijing's political, economic and military ties will, for better or worse, affect the security and prosperity of Europe, the Indo-Pacific and the global stage in the intensifying battle between democracy and autocracy.

At the same time, the trajectory of their relationship in the short, medium and long term is not set in stone but will depend on numerous factors inside, between and beyond Russia and China. Four categories of factors are outlined below:

- *Internal relations*: bilateral factors that *contribute to strengthened relations*;
- *Internal relations*: bilateral factors that *limit and challenge relations*;
- *External relations*: factors *related to the European geopolitical theatre*; and
- *External relations*: factors *related to the Indo-Pacific geopolitical theatre*.

The first two are related to *bilateral Russia-China ties* and involve political, economic, military and strategic factors. The other two are related to *external events and actors in Russia's and China's respective main geopolitical theatres of action*, such as relations with third actors, regional dynamics and power balances, and wars and escalation outcomes.

In analysing these factors, the report considers their development in relation to different timeframes, as this gives a better understanding of how and when the different factors might be relevant:

- *The short term is defined as 0–2 years from now* and considers current and ongoing events and power dynamics and their immediate to near-future effects.
- *The medium term is defined as 3–9 years from now* and the focus is on still forming or solidifying trends and shifts, and their outcomes a couple of years down the line.
- *The long term is defined as 10 years and beyond from now* and examines deeper structural and systematic changes and transformations and their more uncertain long-term implications.

Based on these various factors and their hypothetical development in the short, medium and long term, the report outlines three plausible future scenarios for how Chinese-Russian

relations will develop. In describing these scenarios, the report also expands on and analyses what they entail, how they might come about, what currently speaks for and against the likelihood of each and what they mean for Russia, China and the West.

The primary functions of scenario mapping are to allow us to imagine the [consequences](#) of different future [situations](#), identify the actions and paths that lead us there and develop effective strategies for various outcomes. The report therefore also analyses both the role of western policy choices in each scenario and the respective policy implications for the West.

Bilateral factors contributing to strengthened relations

This category comprises the direct bilateral factors in the relationship between Russia and China that contribute to potential future development or improved relations in four main spheres – the political, economic, military and strategic. While relations between Russia and China have been improving for several decades, this trend has gathered pace significantly in the areas since Russia's full-scale invasion of Ukraine. Arguably, if the war continues to drag on, this speaks for a continued development of stronger ties. Furthermore, in the various spheres covered below where cooperation has increased, there is an ongoing process of formalization and institutionalization of connections, creation of mutual dependencies, and path dependency of a joint strategic partnership against the West, all of which also point to a similar future direction.

[Politically](#), the two presidents and other high-ranking representatives frequently emphasize in [meetings](#) that the relationship is strong, growing, [resilient](#) and comprehensive, despite hostile global forces and pressures. The institutionalization of contact and cooperation between government officials on many levels is thus a vital factor for the future. Moreover, the personal relationship between Putin and Xi is particularly close, and therefore, in the long-term, how long these two aging leaders can maintain their grip on power will be crucial for the relationship.

[Economically](#), relations have [grown](#) significantly since the start of the war. After an initial slump, trade recovered to record levels in July 2022, and Russian energy exports to China have increased substantially. China's economic presence in and exports to Russia have also strengthened considerably in many areas, such as [machinery](#), [vehicles](#), [electronics](#), chemicals, plastics and rubber. The use and role of the [yuan](#) have grown both in Russia – in its [reserves](#), [stock market](#) and bank [loans](#) – and in its [trade](#) with both China and third countries, [creating](#) dependencies and risks for Moscow.

Cooperation is also growing around trade routes and infrastructure, as well as trade between [regions](#) and across the [border](#). As trade relations grow, so does the dependency of each on the other's exports and markets, albeit unequally (see below), hinting at closer future ties too. In the short to medium term, how much continued support China provides to prop up the Russian economy will be a vital factor in the relationship's overall trajectory.

Militarily, relations continue to [strengthen](#), as evidenced by joint [military exercises](#) and ongoing cooperation on technological development. The two countries have become institutionally closer in the defence sphere through contacts, interoperability and joint ventures. This is a key factor for the development path of future relations, including through potential mutual dependency on a joint strategic posture towards the West.

Crucially, China is providing wide-ranging and increasingly important [material](#) support to Russia's war effort and defence [industry](#). This includes sensitive technology, navigation equipment for [helicopters](#), drone components, parts for fighter jets, radar, optics and [jamming](#) equipment, excavators for digging trenches, electronics and microchips, machinery, vehicles, a range of [metals](#) and [chemicals](#) vital for the defence industry and various other components, parts and dual- and "omni"-use goods. Since early 2023, US representatives have continuously [expressed](#) concern that China could start to provide more direct military support. According to experts, Russia's stores and output of military equipment [might](#) start to [dry up](#) in a few years. The amount of military-material support China provides in the medium term could be central for the war in Ukraine and the closeness of relations.

Strategically, China and Russia are – and are likely to remain for the foreseeable future – united in their opposition and resistance to the West's liberal world order and its principles of democracy and human rights, as well as against what they see as the hegemony of the United States. These run counter to the two regimes' ambition and goal to remake the global order in their image, so that they can freely control and dominate their respective parts of the world. This fundamental of their relationship is unlikely to change and speaks strongly in favour of a continuation of current trends.

Importantly, each [shares](#) many positions on important issues such as the war against Ukraine, its causes and related subjects. Both believe that NATO's actions [provoked](#) the conflict, that Russia has been forced to protect its legitimate security interests and that NATO is an antagonistic organization that threatens the security of both Europe and the Indo-Pacific. China's interest in NATO has [grown](#) significantly since the outbreak of the war. China has [adopted](#) Russia's concept and interpretation of "indivisible security" as a development of its existing stance, and both view the United States as a manipulative actor trying to strengthen its power through the war. Sanctions are described as illegal and counterproductive tools for weakening Russia and China. Beijing has also tried to [undermine](#) western peace initiatives at Russia's behest.

This strategic coordination – although not yet complete alignment – in a growing range of spheres in the international arena has [increased](#) significantly since the war. These include closer alignment on global narratives, [disinformation](#) and [propaganda](#) efforts; closer cooperation in [international bodies](#) such as the [UN](#), the [BRICS](#) (the intergovernmental organization comprising Brazil, Russia, India, China, South Africa and others) and the [Shanghai Cooperation Organization](#) (SCO), closer positions on various issues such as NATO and its [presence](#) in the Indo-Pacific region and anti-western [sentiments](#) in the so-called Global South. This growing global alignment suggests less friction and greater opportunities for closer global cooperation in the future.

Moreover, it is remarkable how far the Chinese leadership has gone to support Moscow. Despite the negative impact on China's relations with West and its reputation with some countries globally, the greater risk of a [trade war](#) with the United States, increased western [attention](#) on Taiwan, European [alignment](#) with the more "hawkish" US stance on China, strengthened and renewed [Transatlantic](#) relations, a newfound [geopolitical](#) and defence-industrial [urgency](#) in Europe and the major negative economic [consequences](#), China is continuing to support Russia. China is also striving to sabotage this European awakening and Transatlantic unity by exploiting weak links such as [Hungary](#) and Serbia, among others. All of this speaks against China abandoning or distancing itself from Russia in the near future, despite western pressure.

Bilateral factors limiting and challenging the relationship

Like the first, this second category of factors also deals with direct bilateral aspects of Russian-Chinese relations, but those which put strain on the development of the relationship. These include the political, economic, military and strategic spheres, and their alignment and cooperation in various global regions, as well as the crucial factor of the growing power imbalance between the two.

Despite many signs of strengthened relations, Russia's war against Ukraine has also exposed and reinforced the many [limitations](#) of the relationship. The war is perhaps the most [serious test](#) for the relationship in several decades and demonstrates the long-term, difficult [challenges](#) it faces. These challenges include political differences on many issues and an increasingly skewed power balance that drives Russia's concern about its status, independence and room for manoeuvre. In the medium term, the longer the war drags on, the greater strain it could put on these ties.

Significant political [differences](#) exist on many issues. Russia's violation of international law seems to have [irked](#) China, as it is detrimental to China's international image as a responsible global actor and its efforts to portray itself as a strong proponent of territorial integrity. Throughout the war, [China](#) has called for a ceasefire and peace negotiations, in an [attempt](#) to appear neutral to avoid a negative impact on its reputation. China has also clearly [signalled](#) against Russian nuclear threats, even if such criticism has not been explicitly directed at Russia, and [against](#) Russian imperialistic rhetoric on Central Asia.

Economic ties are limited by Russia's fear of being exploited and, more practically, by [insufficient](#) infrastructure and lacking Chinese political will. Moreover, Russia has seen very little foreign direct investment from China – less than [half](#) of what Kazakhstan received in the period 2016 to 2023 – and Chinese Belt and Road Initiative (BRI) investments in Russia, previously the top destination, completely [dried up](#) in 2022 and 2023. In the long term, whether China will agree to finalize construction of the long-awaited but [frozen](#) *Power of Siberia 2* gas pipeline will be important for how far trade relations can grow, as a large part of bilateral trade (and its growth) comprises Russian hydrocarbons exports.

China's [consideration](#) of secondary sanctions, its reputation and its economic relations with the West also present serious obstacles. In the medium to long term, how much pressure western secondary sanctions put on China, and the degree to which China strives to adhere to these sanctions, will play a fundamental role in ties between Moscow and Beijing.

In the [military](#) sphere, several limitations are evident. China's reluctance to provide Russia with weapons and munitions for its war effort is a clear example, as is the long-term sharp [decline](#) in Russian arms exports to China. While China relies on Russian military technology in some areas, Moscow's usefulness to Beijing in this regard is likely to decrease over time due to its [weakened](#) arms export capacity, the Ukraine war's demonstration of the deficiencies of Russian weapon systems and China's efforts to reduce this dependence through domestic production.

Cooperation on technological development is hampered by deep mutual suspicion, Chinese industrial [espionage](#), theft and [reverse-engineering](#) of Russian technologies, and Russian fears of being exploited and overtaken. Both countries value their strategic autonomy highly and are unwilling to risk their security for the other.

Discrepancies in Sino-Russian global strategic cooperation and alignment

The two authoritarian states' views on both Europe and Ukraine also differ. Despite agreeing with Russia on excessive US influence on EU foreign policy, China is more positively inclined towards European independence, [as long](#) as it is anti-US and in line with Chinese goals of driving a wedge into the Transatlantic alliance. Similarly, Russia views Ukraine as a puppet of the United States with “an illegitimate Nazi regime”, while China has described Ukraine as a legitimate and friendly state and [maintains](#) its relations with the country.

Importantly, when it comes to their views of the future world order, China and Russia are aligned only on what they do not want, not on what they do. Both oppose a continuation of US hegemony and the western-created and -led liberal world order, which they see as disadvantaging their respective countries and their geopolitical ambitions abroad. However, what they want instead is much harder for them to agree on, and thus not spelled out in concrete terms. This is often encapsulated in the term “[multipolarity](#)”, which is [popular](#) in the [Global South](#) and therefore central to [Moscow's](#) and [Beijing's](#) narrational efforts to rally non-western countries against the perceived imperial, neo-colonial West. The advantage, and problem, for Russia and China is that multipolarity is a very vague term that is understood [differently](#) by different countries, including Russia and [China](#) themselves.

One formulation used to elaborate the concept of multipolarity in several key Russian-Chinese joint statements, including those of [February 4, 2022](#), and [May 16, 2024](#), as well as separately by the [two sides](#), is the “democratization of international relations”. However, many other more or less vague notions are also frequently used by the two states to explain the term that include [references](#) to the UN and international law, a [world](#) that is more ‘just’, ‘balanced’, ‘[orderly](#)’ and ‘[equal](#)’, the need to promote cultural and civilizational [diversity](#) and [economic globalization](#) and the need for international cooperation and dialogue, as well as to the presence of ‘sovereignty’ and [absence](#) of (mainly US) hegemony and monopolization.

Furthermore, their differing geopolitical and global interests, along with Russia's increasingly poor economic and strategic prospects, are notable. In the medium to long-term, how closely Moscow and Beijing can manage to align strategically on various global issues, and how well they can jointly formulate a coherent alternative to the West's liberal world order, could matter a great deal for the future of their relations.

Another discrepancy between the countries is that both Russia and China want the other to serve as a distraction for the West, particularly the United States, in their respective theatres of geopolitical conflict, allowing them more room for manoeuvre in their own. Moscow's clearest path to victory in Ukraine involves Washington abandoning Kyiv, perhaps to focus on the Indo-Pacific instead, while Beijing benefits from Russia's war in Europe by delaying and weakening western engagement in the Indo-Pacific. It is therefore notable when China manages to insert formulations in joint [statements](#) about NATO needing to remain a ‘regional’, i.e., European, organization, whereas Russia would probably not mind NATO shifting its focus away from Europe.

Another potential source of tension between the two is rivalry and competition in various regions bordering their countries. In the Arctic, while [cooperation](#) is increasing, Russia is at the same time [trying](#) to keep China at arm's length. In [Central Asia](#), competition and shifting power dynamics are negative factors in the relationship, as [Russia's](#) influence decreases and China's presence increases. While [China](#) is not seeking to supplant Russia as the security

provider for the region, Beijing's clear support for Central Asian countries' increasing distance from Russia – as manifest in the ongoing [institutionalization](#) of the “Central Asia 5 + China” format – adds to these challenges and is troubling for Moscow. In 2023, China's trade turnover with Central Asia (US\$ 90 billion) was more than double that of [Russia's](#) (US\$ 44 billion).

On the Korean Peninsula, improved Russian-North Korean [relations](#) could lead to difficult *menage-a-trois* [dynamics](#) with potentially negative consequences for China. These might include complications in China's relationship with the United States, increased regional instability, counterproductive effects on China's criticism of the United States' so-called Cold War mentality and bloc-thinking, and greater Russian leverage.

Consequences of the power imbalance in the future

One of the most important effects of the war is the strengthening of the long-standing [trend](#) of a [shift](#) in the power balance in the relationship. The development of an ever weaker and more [dependent](#) Russia alongside a relatively strong China can be seen in many areas – from the political to the economic, military and regional – and is likely to continue. Interestingly, such inequality is also indirectly evident in the countries' rhetoric, as both [Moscow](#) and [Beijing](#) have repeatedly emphasized Russia's great power status and its independence, as when in June 2022 Putin [emphasized](#) that Russia does not need China to support it “every step of the way”.

However, exactly when, how and why China will utilize its increasing power over Russia remains unclear. Dependency does not mean that Russia will become completely subservient to China. Nor does it automatically translate into Chinese influence over Russian political, economic or military decisions. China is likely to proceed cautiously. It is well aware of Russian sensitivities, as well as of its own dependence on Russia as a strategic partner and on Russian resources. Important questions include how much dependence and inequality Russia is willing to accept, and how great the risk is that China might play its stronger hand too soon, thereby creating tensions within the Russian leadership, elite groups or population.

Nonetheless, Russia will have to come to terms with growing Chinese demands, whether they concern [discounts](#) on gas and oil, an increased Chinese presence in Russia, [Central Asia](#) or the [Arctic](#), access to Russian military technology, reduced Russian defence industrial cooperation with [India](#) or support for China's various political positions and geopolitical ambitions in its vicinity. In the event of [deteriorating](#) relations or increased Chinese fear of reactions from the West, China's power may also be used against Russia. China's room for manoeuvre is increasing while Russia's is decreasing.

Therefore, in the long term, how much weaker and dependent Russia becomes, and how far and how directly China will exploit this, is likely to significantly affect the overall development of the relationship. A continuing and even growing power imbalance might draw the countries closer as Russia has no other options and China sees opportunities, but is likely at the same time to give rise to a number of difficult challenges.

External factors related to the European theatre

The development of Russia-China relations will depend not only on what happens between the two states, but also to a significant degree on factors external to the relationship. This third category of factors thus deals with those factors related to Russia's main geopolitical theatre – the European one.

Crucially, the development of Russia-China relations will depend on Russia's war on Ukraine. While relations have continued to develop, the war has also intensified the limitations and challenges, and represents a serious strain on the relationship, not least as supporting Russia entails increasing costs for China.

How the war develops – and potentially ends – in the medium to long term could have significant consequences for the Russia-China relationship. A more advantageous war outcome for Russia (total or partial victory, or a [Minsk-style](#) “compromise”) could further strengthen the ties, as well as Moscow's relative power and value as a partner for China. A worse outcome – a stalemate or a Ukrainian victory – would probably accelerate Russian dependence on – and potential toxicity for – China.

Certain drastic outcomes could cause a serious deterioration in Russian-Chinese ties, notably Russian use of tactical nuclear weapons in Ukraine or other types of nuclear escalation, Moscow aggressively testing NATO's article 5 or an escalation to minor or full-scale conflict between Russia and NATO, as Russia might then become too great a burden for China. In the long term, the key for China is to avoid a Russian defeat leading to regime [change](#) or collapse, and thus the loss of its most important strategic partner. Conversely, and importantly, the outcome of the war will also partly depend on how the relationship and China's support develop.

Moreover, in the medium to long term, the evolution of China-Russia relations must also be viewed through the lens of how China's relations with the West in general, and China-Europe [relations](#) in particular, develop. As the West grows increasingly wary and weary of the systematic and decisive support China is providing for Russia's war, calls to punish and [pressure](#) China to distance itself from Russia have grown louder. At the same time, to reach its long-term goals, China is striving to continue to navigate the delicate [balancing act](#) between supporting Russia, upholding stable and predictable political and economic relations with the West, and preventing still China-tolerant European countries from becoming as [hawkish](#) as the United States. Thus, the levels of western, Transatlantic and European unity and resolve, to counter Russia and China separately and to perceive them as a joint threat, are also important.

External factors related to the Indo-Pacific theatre

Beyond the crucial factors in the European theatre, such as Europe's agency and approach to China, and Russia's war against Ukraine, the future of Russia-China relations will also drastically depend on geopolitical developments in the Indo-Pacific region – the main geopolitical theatre of action of China. While not irrelevant for Russia, this region is fundamental to China's ambitions, prospects and behaviour internationally, and therefore also Beijing's ties with and actions vis-à-vis Moscow. This fourth category thus deals with the external factors of this region.

First, how the geopolitical [balance](#) and dynamic evolves between the various actors in the Indo-Pacific, such as China, the United States, Taiwan, Japan, India, North Korea and South Korea, among others, will be important. In the medium term, the strengthening of anti-Chinese and pro-western [groupings](#), such as [AUKUS](#), the [Quad](#) (Australia, India, Japan and the United States), the Japan-United States-South Korea [triad](#), and Japan and South Korea [bilateral](#), might push a “surrounded” China closer to its only real strategic partner, Russia. The same goes for increasing US bilateral engagement with countries such as the [Philippines](#) and [Vietnam](#), and the increasing Indo-Pacific engagement and presence of [NATO](#) and [Europe](#) in the medium to long term. On the other hand, how Moscow’s ties with certain Indo-Pacific countries, such as [India](#) and [North Korea](#), with which China has complex relations, develop in the short term, might complicate its ties with Beijing.

Second, and relatedly, whether we see some type of regional [escalation](#) (potentially driven by China), and how [Russia](#) and other actors respond to this, will also be key. Several different escalation scenarios are imaginable, especially in the medium to long term, including a conflict on the Korean Peninsula, Chinese [military aggression](#) against a neighbour such as India, Japan or the Philippines, a Chinese blockade or even [invasion](#) of Taiwan, and US-China trade wars or military conflicts. Many [see](#) the year 2027 and beyond as pivotal for China’s capacities and ambitions to invade Taiwan. The greater the hostility between China and western actors, the more Beijing might turn to Moscow, to provide and receive various kinds of support *quid pro quo*. How far Russia is willing or able to go in support of China’s regional geopolitical ambitions will also be important.

Third, finally and more specifically, how US-China relations develop is likely to be critical for the future of Russia-China ties. While various future bilateral developments between Washington and Beijing are imaginable, many of the current trends point to continuing and probably increased tensions and rivalries. If US-China relations significantly worsen, escalating into a trade war, large-scale US sanctions on China or some type of proxy or direct military conflict, this is likely to have a profound impact on Russia-China relations. As China tries to balance relations with both Russia and the US/the West, the worse it gets between Washington and Beijing, the more prepared Beijing might be to draw closer to Moscow.

The future of the relationship: three scenarios

The development of and interactions between the various factors covered above in different timeframes will be crucial for the future of the relationship. Importantly, neither the long-term, powerful fundamentals of the relationship – political, economic, military and strategic – nor the many limitations and challenges in these areas are likely to disappear. Similarly, factors related to both the European and the Indo-Pacific theatres will be central to how ties develop. As these various factors point in different directions, there are several plausible future scenarios for how Russia-China relations might develop.

This report outlines three broad types of scenarios, where the different factors lead to different outcomes. The *first scenario* is a **continuation of the status quo**, with steadily increasing cooperation but clear limitations. The *second scenario* is a **worsening of relations**, where the negative factors start to outweigh the positive ones. The *third scenario* is a **decisive strengthening of relations**, significantly beyond the status quo and current trends, due to

the mitigation of negative factors or a much larger role for the positive factors.

While other scenario conceptualizations are entirely possible, including more specific versions of these three, completely different types and “black swans”, these three scenarios have been chosen based on plausibility, probability, simplicity and usefulness in engendering policy implications. Moreover, given that the three scenarios are broad archetypes covering many different cooperation areas, it is possible to imagine a large number of combinations of elements from the different scenario types, where cooperation in one area has progressed much further than in another. The archetypes thus help to identify the continuum of cooperation, from worse to better, in various spheres of future Russia-China relations.

	SCENARIO 1: CONTINUATION OF STATUS QUO	SCENARIO 2: WORSE RELATIONS	SCENARIO 3: MUCH STRONGER RELATIONS
What would it entail?	Steady but moderate improvements overall Clear limits & challenges remain, but are manageable No direct Chinese military support to Russia	Stagnating and deteriorating ties widely China favoring ties with West – less support to and trade with Russia Clear misalignment on issues and regions	Close strategic & political alignment across issues Military alliance with defense-tech cooperation & interoperability Continued strong growth in economic ties
How would it come about?	No clear rift between China and the West; little pressure on China Unresolved Ukraine war; no Indo-Pac escalation Indecisive EU, misaligned with the US on China Russia not becoming too toxic, unstable or big a burden for China	Long-term challenges & limits increasing Resolute, united West pressuring China, but maintaining relations Internal problems or change of leadership in Russia or China Ukraine war development negative for Russia	Emboldened China due to diminished Western unity, resolve & actions Russian victory in war giving China more strategic manoeuvrability Military or trade escalation in Indo-Pac or between US and China China-West breakdown, incentivizing closer Chinese ties with Russia
Consequences for Russia and China?	Russia's economy & war effort bolstered Russia less isolated but more dependent China partially succeeds in balancing ties with Russia and West	Russia isolated, poorer, weakened, & more likely to lose in Ukraine China losing vital junior strategic partner, but freer to navigate globally & exploiting the West?	Russia's economy, war efforts, global position significantly boosted China emboldened vs the US, but less global room for manoeuvre, & status? Economic repercussions for China, but some gains
Implications for the West?	Continued Ukraine war, threatening Europe Difficult dilemmas in handling China's support for Russia Europe without resolve?	Bolstered European & Transatlantic security, interests & opportunities Weakened autocratic block globally Disunity on China policy?	Ukraine & Europe directly threatened by China's military support to Russia Western global interests & influence jeopardized Autocratic consolidation
What speaks <i>for</i> or <i>against</i> it?	For: several decades of steadily growing ties For: many current trends since the start of the war Against: West's growing support to Ukraine makes Russian victory less likely Against: stagnating growth in Russia-China trade ties	For: increasing Western pressure on China For: China-West total breakdown unlikely Against: long-term deep Russia-China strategic alignment Against: ongoing institutionalization of ties; mutual dependence	For: Intensifying rivalry between China and West & instability in Indo-Pac For: growing global alignment against West Against: aggravating challenges to relations; limits unlikely to dissipate Against: China unwilling to risk ties with the West
Likelihood across timeframes?	Short-term: high Long-term: medium	Short-term: low/medium Long-term: medium/high	Short-term: low Long-term: low/medium

Scenario 1: A continuation of the status quo

The first scenario type, which is the most likely in the short to medium term, given various current trends and no unexpected developments, is a continuation of the strategic partnership, whereby Russia increasingly becomes a supporting partner to China.

What would it entail?

In this scenario, the Russian-Chinese relationship steadily and moderately improves in various spheres – economic, political, diplomatic, military and defence-industrial technology – but many limitations and [challenges](#) remain, placing constraints on the growth of the relationship and what the partners can realistically gain from each other. China continues to carefully balance support to Russia with maintaining functional relations with the West. Therefore, China keeps the Russian economy [afloat](#) and boosts Russian war efforts through imports of gas and oil, and exports of various products, which include vital technology and dual-use products.

There may be stronger mutual efforts to boost yuan-ruble payments and [trade](#) as well as a faster “[yuanization](#)” of the Russian economy. Moreover, Russian and Chinese efforts to build an [alternative](#) financial and payment ecosystem [outside](#) of US [dollar](#) hegemony could be strengthened.

In this scenario China, however, does not provide significant direct military support such as weapons or ammunition. While military exercises and joint defence technology cooperation increase, there is no formal military alliance. In the event of a Chinese [war](#) against Taiwan, Russia’s [support](#) does not extend beyond political, diplomatic and inconsequential material backing.

In the [information](#) sphere, Russia and China could continue to more closely [align](#) and [coordinate](#) their efforts and narratives. A recent indicator is the various cooperation [agreements](#) between state media actors struck during Putin’s visit to Beijing in May. This also includes closer diplomatic cooperation and outreach in [multilateral](#) forums, with the Global South and within the BRICS and the SCO. China’s efforts to [hamper](#) western and Ukrainian peace efforts in [favour](#) of its own pro-Russian stance are a recent example.

Finally, it is also possible to envisage a strengthening of the current trend for the two societies to become increasingly connected not only in the political, economic and military spheres, but also culturally and [societally](#), in fields such as education, [science](#), tourism, language, exchanges and other people-to-people contacts. This is especially relevant with regard to Russia’s ongoing [transformation](#) away from a western socio-cultural orientation. According to [polls](#), the attitude of ordinary Russians towards China is becoming increasingly warm. Importantly, Russian universities have special expertise in subjects such as maths and theoretical physics that would be valuable for China.

How would this come about?

This type of scenario builds on several likely but not guaranteed premises: that Chinese-western relations will continue to be difficult but manageable with no clear breaks; that the West does not make it too difficult or costly for China to support Russia; that the current

Russian regime and internal political system remain relatively [stable](#); and that Russia does not become too toxic or burdensome for China. While the continuation of these premises seems probable, especially in the short term, they should not be taken for granted in the medium to long term, given the many limitations and challenges.

In the European theatre, a Europe [divided](#), [indecisive](#) and [misaligned](#) with the US on China would be likely to contribute to this scenario, as it would make it easier for Beijing to continue its balancing act between Moscow and the West. As various individual European countries [pursue](#) their own paths in relations with China, [prioritizing](#) national interests, as actors like [Hungary](#), [Slovakia](#) and [Serbia](#) play spoiler and sabotaging roles, and as China continues to [exploit](#) internal [divisions](#), Beijing can continue to count on [schisms](#) in China policy within both Europe and the Transatlantic alliance in at least the short term.

An unresolved Russian war against Ukraine, which seems probable in the short to medium term, is also conducive to this scenario, as a clearer outcome in either direction could lead to the other two scenarios.

In the Indo-Pacific theatre, this scenario would probably build on the absence of a dramatic geopolitical or [military](#) regional escalation dragging China into confrontation with the United States, as well as on continued relatively functional [economic](#) and [political](#) relations between Washington and Beijing. Also relevant for this scenario is a continuation of current trends with regard to various regional bilateral and multilateral ties, including that anti-Chinese groupings do not push a desperate Beijing too far.

What would be the consequences for Russia and China?

For Russia, the consequences would be continued Chinese political, economic and material support, helping to [prevent](#) Russia from becoming completely isolated on the global stage, keeping its economy alive and sustaining its defence-industrial war machine. However, this would also mean increasing dependence on China, potentially leading to demands from Beijing that might compromise Russian interests.

For China, this scenario would mean a continuation of the tricky navigation between not allowing Russia to fail and not alienating the West or pushing Europe too far towards the [hawkish](#) direction of the United States. This allows Beijing to imperfectly but semi-plausibly achieve its dual goals of preserving its junior strategic partner Russia and [not consolidating](#) a hard anti-Chinese western alliance. Thus, if the status quo continues, and Beijing is not forced to choose one side over the other, this would be a fairly comfortable and positive development for China.

However, if the West starts to put serious pressure on China to distance itself from Russia, then these dual Chinese goals become increasingly mutually incompatible, and Beijing's balancing act much harder, potentially forcing China to make difficult choices between only bad options.

What would it mean for western policy?

For the West, this would mean a much higher likelihood that Russia, propped up by China, will be able to continue its war on Ukraine for many years, thereby threatening European security, stability and prosperity, Transatlantic [unity](#) and western global [credibility](#).

It would also mean that the West would have to continue its difficult, unending assessments of whether or how much China is enabling Russian war efforts, whether and how to stop this and, particularly for the EU, how to weigh this against upholding economic relations with China – a mirror [dilemma](#) to China's. On the global stage, it could risk [weakening](#) the liberal world order and strengthening the global autocratic [axis](#) to the detriment of western interests.

A continued strategic alignment between Russia and China will also require a western ability to deter and counter both simultaneously, in both the European and the Indo-Pacific theatres, and beyond. Just as Russia and China learn from each other in their confrontations with the West, so too must the West draw lessons on the synergies between their malicious behaviour across domains.

What speaks for or against it?

Many current trends point towards this scenario in at least the short term. Russian-Chinese relations have been developing not just for the two years since the start of the war, but for several [decades](#). While there are different views on how strong the relation's foundations really are, or whether this is partly a “marriage of [convenience](#)”, many factors keep the two nations together beyond an immediate, opportunistic and temporary alignment of interests. These include deeper economic and political ties, increasing [cultural](#) exchanges and people-to-people contacts, and a common understanding and view between the two regimes (and especially the two presidents) on areas such as indivisible security, mutual spheres of interest where foreign powers may not interfere and the threat to regime stability and political-system viability that democracy, human rights and the liberal world order pose. The strategic alignment against the West thus in many ways runs deep and is unlikely to change soon.

However, in the medium to long term, several structural, albeit more uncertain, trends are emerging or solidifying that speak against this scenario type. Economic ties, which have skyrocketed since 2022, are now limited by existing infrastructure and political will, and are unlikely to grow any further. This is reflected in the level of bilateral trade in the first seven months of 2024, which only grew by 2 % compared to the same period in 2023. In the military sphere, China will become less and less dependent on Russian technology and arms. The two countries' strategic coordination globally, which has improved on some issues, mainly related to criticism of the West, behaviour in multilateral forums and outreach to the Global South, seems unlikely to become further aligned on many other issues and regions, notably the Arctic, Central Asia, the Korean Peninsula and the Middle East.

Scenario 2: A worsening of relations

A second scenario type is a deterioration in Russia-China relations. In this scenario, which is less likely in the short term but more likely in the long term, cooperation stagnates and decreases in various areas due to the increasing importance of the many negative factors relative to the positive.

What would it entail?

There are several variants of this scenario, depending on how bad things get between the two

partners, but the overarching theme is a clear negative break from current trends. Politically, it could mean fewer high-level visits and exchanges, and China more clearly distancing itself from Russia in its diplomacy and rhetoric. This could also entail China overtly or covertly pushing back against Russia on for example Ukraine, nuclear [sabre-rattling](#) or [North Korea](#); or China starting to diplomatically support Ukraine, its peace formula and a long-term war outcome that ensures Ukrainian territorial integrity and sovereignty, instead of China's current [pro-Russian](#) "neutrality" which emphasizes the "legitimate security interests" of all.

Economically, this scenario could mean China decreasing its support for Russia's economy and war efforts by buying less Russian oil and gas and abandoning joint energy infrastructure plans such as [Power of Siberia 2](#); exporting fewer products, including military and dual-use components, to Russia; investing less in Russia; and generally doing more to avoid violating western sanctions. China could also in this scenario more bluntly start to [exploit](#) Russia's various dependencies on China to extract more concessions without concern for Russian sensitivities.

Militarily, it could mean fewer joint exercises and stagnating military-technological and defence-industrial cooperation. Wary of each other, in this scenario the countries would not share any of the respective sensitive military technologies that the other needs for their modernization, particularly Russia.

Socially and culturally, in this scenario type, the two countries and their populations and societies would begin to drift apart rather than grow closer. In Russia, this could manifest as popular displeasure with the country's humiliating dependence or junior status relative to China, and in particular [anger](#) at an increased Chinese [presence](#) and [activities](#) in Russia's Far East. In China, it could be reflected in the population's unwillingness to sacrifice ties with and opportunities in the West for a sub-par northern substitute.

How would it come about?

As shown above, the relationship has many limits, challenges and sources of tension, and many imaginable [combinations](#) of these could lead to this type of scenario. Furthermore, there are also many reasons why China might start to consider Russia's toxicity too costly for Beijing's multiple goals of upholding its vital economic relations with the West, promoting its global status and maintaining its ability to freely navigate complex strategic relations with the United States. Among such reasons are Russian behaviour in Ukraine or the Korean Peninsula, nuclear rhetoric or even action and, relatedly, Russia's growing pariah status in many parts of the world. Another would be increased western secondary sanctions pressure on third countries such as China.

Furthermore, it is possible to imagine possible serious internal problems emerging in both countries that would indirectly affect the relations. If Russia, for structural or technological reasons, could no longer extract or export energy, its value for China would diminish. If Russia's elite starts to be seriously concerned about the country's loss of strategic autonomy, this could dampen Moscow's enthusiasm for further boosting relations. If China's [many](#) and serious [economic](#) problems [aggravate](#) or lead to a major [crisis](#), it is likely that this would significantly negatively affect both Russia and their economic relations, given Russia's economic dependence.

Another potential aspect is changes in the leadership of the two countries. While strong bilateral relations extend far beyond the two presidents, the importance of the personal

connection between Putin and Xi should not be [underestimated](#), given its longevity, the level of trust and the frequency of interactions, as well as their individual power over their respective regimes. A sudden replacement of either leader – which is unlikely but not impossible, especially in the long term given their ages – could lead to abrupt changes, most likely for the worse for bilateral ties.

In the European theatre, this scenario type could build on a Europe that is more [unified](#), resolute and [aligned](#) with the United States on how to [counter](#) Beijing. The more pressure Europe puts on China to not support Russia, the less European countries will allow themselves to be instrumentalized by Beijing's divisive approach. In addition, the stronger the Transatlantic alliance, the less likely it will be that Beijing will be willing or able to continue to support Moscow. On the other hand, a Europe that is completely aligned with the hawkish US stance on China might produce the opposite effect if China feels pushed into the arms of Russia.

Negative progress of the war for Moscow is another reason for why Russia could become too much of a burden for China. Russian military setbacks and potential ultimate defeat could lead to a weaker and more isolated Russia on the global stage, less capable of assisting China to counter western interests and power projection. While Beijing would probably still be interested in its natural resources and geography, its military technology and its markets, such a Russia would be a less valuable strategic partner for China and therefore less worth risking relations with the West for.

At the same time, while a far from certain consequence, if a negative war outcome for Russia leads to internal instability, unpredictability and even regime change or collapse, this could be an extremely negative development for China. In such a scenario, Beijing might lose its main strategic partner and be forced to have to deal with severe instability across much of China's northern, and potentially also western, borders, especially if the chaos spreads south to Central Asia. China would want to avoid this nightmare at all costs. This could therefore lead to far more immediate Chinese support for the Russian regime to avoid such a development, with the potential to rapidly draw the two regimes closer together.

In the Indo-Pacific theatre, several potential developments could contribute to the manifestation of this scenario. A serious challenge to relations would be Moscow-fuelled North Korean aggression against South Korea or escalation on the Korean peninsula, which runs counter to Beijing's desire for stability in its neighbourhood. A less serious challenge would be Russia continuing to build ties with India.

If relations improve or at least stabilize between China and the West in the Indo-Pacific, particularly with the United States, and both sides manage to navigate and accommodate each other's interests and concerns, there might be less need and fewer incentives for China to turn to Russia, as well as better chances for the West to pressure Beijing to distance itself from Moscow.

What would be the consequences for Russia and China?

For Russia, being deprived of support from its main backer and strategic partner would mean further global [isolation](#) with potentially severe consequences in many areas. Economically, fewer Chinese exports and less income from energy exports would threaten the stability and viability of Russia's economy, state budget and markets. Militarily, Russia's defence industry,

which depends on Chinese export and components, would be weakened, hampering Russia's war efforts in Ukraine as well as its long-term military capabilities. Politically, losing Chinese support could weaken Russia's global position and opportunities, making it more toxic for other partners such as the BRICS, Turkey and Central Asia, among others, damaging Russian interests and its ability to exert influence.

For China, the consequences would include the potential loss of its main strategic partner in its long-term rivalry with the United States. Deteriorating relations with Russia would be likely to have negative economic, political and military impacts on China, as it would have less access to cheap energy, receive less Russian support for its global geopolitical ambitions, and have less access to the [Arctic](#), and to the [few](#) technological and military-technological areas where Russia still has an edge, such as civilian [nuclear energy](#) and [space](#). It could also mean having to worry more about its 4,209-km long [border](#) with its northern neighbour, potentially diverting attention and resources it would rather spend elsewhere. Losing its closest and most powerful partner would thus hamper Beijing's long-term goal of overtaking Washington as the leading global superpower.

However, China ceasing or limiting its support for Russia, and thus mitigating many western concerns, could also promote the stabilization of fraught US-China relations and reduce European aversion to China, potentially opening up more space for China to navigate, manage and [influence](#) western de-coupling and de-risking [strategies](#). On the other hand, given the numerous other grounds for strategic competition and rivalry between China and especially the United States beyond the issue of Russia, Beijing might conclude, with good reason, that the trajectory of the US-China relations would not change considerably either way.

What would it mean for western policy?

For the West, this would arguably be the best of the three scenarios, as less Chinese support for Russia's economy and war effort would make a Ukrainian victory in the war much more likely. European and Transatlantic security, prosperity, influence and resolve would all be boosted, including in other global regions. Moreover, reduced Russian-Chinese cooperation and alignment in the international arena, as well as a reduced ability to coordinate and provoke anti-western sentiments, would weaken the autocratic bloc in the global battle for the world order.

However, this scenario might pose a different long-term challenge for the West. If China were no longer bogged down by having to support an increasingly toxic, unstable and isolated Russia, it might be freer to manoeuvre and navigate its relations with the West and other global actors. Such a scenario might engender even more [disunity](#) and friction in the West on how to handle long-term trade and political relations with China. The EU would be less concerned about its immediate security and more inclined to maintain prosperous economic relations with China, while the United States might focus more resources on handling the Chinese threat in the Indo-Pacific and expect European [backing](#) in this theatre after all the military support the United States has provided to counter the Russian threat in Europe.

What speaks for or against it?

Despite numerous limits and challenges, many of the deeper foundations of the relationship between Russia and China seem strong and enduring, which makes this type of scenario

less likely in the short term. However, some growing tendencies point in the opposite direction in the medium term and especially in the long term. The longer Russia's war against Ukraine and European security drags on, and the clearer it becomes that China is providing systematic, decisive support for Russia's military industry and war effort, the stronger the western political will to increase pressure on China to change its behaviour.

Thus, the stark December 2023 [warning](#) from the Biden administration to third countries enabling Russian sanctions [evasion](#), and the [increasing](#) number of Chinese entities [sanctioned](#) and export [blacklisted](#) by the [United States](#), has been followed by an increasing number of reports about major Chinese banks' [reluctance](#) or [ceasing](#) to serve Russian customers due to fear of [secondary](#) sanctions and major [problems](#) with payments between the countries. Importantly, in early 2024, Chinese exports to Russia – which [increased](#) by 47 percent in 2023 compared to 2022 and reached a record high in December 2023 – started to drop. In [March](#), [April](#), [May](#) and [July](#) 2024, for the first time since mid-2022, Chinese exports to Russia were lower compared to the same months in the previous year. At the same time, however, this has led to an [increase](#) in financial transactions [through](#) both smaller regional Chinese banks and various murky middlemen.

Arguably, the most reasonable interpretation is that China is reacting to western pressure by [pausing](#) its economic relations with Russia, suggesting that further similar western action could influence Chinese behaviour in this regard. Whether this will affect the other realms of the relationship – strategic, political or military – or the overall direction remains open to question.

Scenario 3: A significant strengthening of relations

The third scenario type, and arguably the least likely, entails a significantly improved relationship compared to the current situation. This could involve a closely aligned political-strategic or full-blown military alliance, or an uninhibited trading relationship.

What would it entail?

Politically, it could mean much tighter political and strategic [coordination](#) between the two countries on various issues and in various regions. In this scenario, China abandons the difficult [balancing](#) act between its increasingly incompatible goals of supporting Russia and maintaining functioning relations with the West, and is thus free to support Russia without concern for a western backlash. Their joint strategic posturing in both the North Atlantic and Indo-Pacific regions, against Europe, the United States, [Taiwan](#), Japan and others, could be decisively strengthened. Government meetings and coordination at all levels could increase, allowing stronger cooperation in a wide range of areas.

Economically, apart from stronger trade and economic relations in general, this could have several implications. Chinese state and private actors might openly and systematically violate sanctions against Russia, perhaps because they no longer fear the consequences if a China-West all-out [trade war](#) is already a reality. China might become less concerned about dependency on Russia due to its fewer options, leading to serious investment in energy infrastructure to enable increased Russian energy exports, such as the long-awaited Power of Siberia 2 gas [pipeline](#).

Militarily, this scenario type could mean several things. One possibility is direct support for each other's wars. China could provide overt, systematic and extensive direct military assistance to Russia such as weapon systems, ammunition, equipment and technology. Conversely, it is also possible to envisage direct [Russian](#) military [support](#) for Chinese ambitions concerning Taiwan and the Indo-Pacific. Another involves increased cooperation on interoperability and joint exercises, involving enhancements in their frequency, complexity and geographical scope, including in strategically sensitive regions such as the Baltic Sea, the Mediterranean, the South China Sea or the [Arctic](#), and potentially involving third countries such as Iran and North Korea.

A third military aspect entails decisively strengthened cooperation on military-[technological](#) and defence-industrial endeavours. This might include collaboration on satellite navigation systems and data exchange, the [space](#) and [counterspace](#) domains, and joint integration of missile defences. In such a scenario, Russia might increase its sharing and transfer of more advanced technologies in the few areas where it still has an edge, such as [air defence](#), [anti-ship](#) and [submarine](#) capabilities, [fighter jets](#) and [early warning](#) systems. In addition, this could lead to further cooperation on [emerging](#) technologies such as [artificial intelligence](#), [quantum computing](#) and [biotech](#).

The most far-reaching and least likely version of this military development scenario would involve a formal military alliance between the two countries. Beyond a legal obligation to risk their own security and troops for the sake of the other, this could entail various concrete functional alliance practices such as coordinated military procedures, joint command, interoperability, and so on.

In the cultural and societal sphere, like the first scenario but with a qualitatively more pronounced effect, there could be a significant acceleration in the growth of connections, and especially a more one-sided boost to Chinese soft power and "sinification" in Russia. Russia could become an especially attractive, cheap and available tourist, student and science destination for the Chinese middle class, given that it would still be a more open society than China's, and that the West, in this scenario, would be far more closed to China.

In the information and cyber landscapes, Russia and China could in this scenario not only [coordinate](#) and bolster each other's narratives in the global information war against the West, but also directly cooperate through joint open or clandestine strategic media disinformation campaigns, influence operations and other hybrid spheres. This would present a much stronger united front and threat to the West.

How would it come about?

As demonstrated above, several inhibiting factors limit the extent to which relations could be significantly strengthened. Mitigation of these factors could lead to this scenario.

A similar positive effect on Russia-China relations could occur if other limitations diminish, such as mutual [distrust](#), regional rivalry or partial misalignment (e.g., in the [Arctic](#), [Central Asia](#) or the [Korean Peninsula](#)), Russian fears of the power imbalance, and the increasingly different long-term prospects, aims and strategies of the two countries. However, a significant mitigation of many of these seems highly unlikely without regime or leadership changes in the countries, given that [distrust](#) and misalignment will continue to be intrinsic to the relationship, as it has been since the very beginning.

An especially important set of factors that could contribute to scenarios of stronger Russia-China relations is related to diminished European and Transatlantic resolve, unity and action vis-à-vis Beijing. The less unified, coherent and coordinated the western pressure put on China, the more Beijing will be emboldened to cross western red lines on supporting Moscow. European and Transatlantic disunity, and internal conflicts on how to deal with China in the short term and engage with it in the long term, could lead to bolstered ties between Moscow and Beijing. European countries and leaders promoting bilateral ties with China and independent policy approaches to Beijing are significant examples of such a development.

In the European theatre, another factor that could lead to strengthened relations is a decisive development or outcome in Russia's favour in its war against Ukraine – such as the West abandoning Kyiv, a collapse of Ukraine's defences and/or a breakthrough for Russia or some sort of pro-Russian ceasefire or peace deal. This could lead to Russia being less of a burden for China, making Beijing's balancing act easier and opening up room for closer ties with Moscow.

In the Indo-Pacific theatre, several factors are of potential importance for this scenario. How the regional alliances and balance develop will be important, as stronger anti-China groupings might incentivize Beijing to seek closer cooperation with Moscow, while closer ties between Russia and North Korea or India might have the opposite effect.

A crucial factor is the continued Chinese interest in working relations with the West. If the current tension, rivalry and hostility between China and the West escalates to a serious breakdown in China-western or China-US relations, manifest for example in a trade war, Russia-level sanctions on China's economy or a US-China military conflict (proxy or all-out), related for example to Taiwan, then this would pave the way for much closer Russia-China relations.

What would be the consequences for Russia and China?

For Russia, this would probably be the best of the three scenarios, as this would enable much more Chinese support for Russia's war efforts and ailing economy while also [countering](#) Russia's global isolation and pariah status. Russia has few other powerful friends. Moreover, although Moscow would still be in a junior and dependent position vis-à-vis Beijing, the power balance might be less skewed than currently if China becomes more dependent on its closer ally, Russia.

For China, a much stronger alliance with Russia would have both positive and negative effects. On the one hand, China would be bolstered by its junior ally in its long-term strategic rivalry with the United States, while also providing Beijing with more tools to coerce and pressure Europe. However, the clearer East-West and democracy-autocracy schism manifest in this alliance might strengthen China's ability to induce or coerce small or middle powers to its side against the West with regard to some states, but weaken it in the case of others. In the long term, it could also be negative for China's image, influence and manoeuvrability globally, as it becomes tied more closely with pariah state Russia and the "[axis](#) of evil".

On the other hand, a continued "[yuanization](#)" of Russia and its foreign trade could serve as both a test for China's efforts to internationalize the yuan and a signal to other countries globally that, with China's assistance, it is possible to reduce dependence on or even break

away from the western financial system. At the same time, however, Russia's growing yuan-related [problems](#) and dependencies might deter other countries.

Furthermore, for both countries, the much stronger access to each other's sensitive military technology would facilitate faster technological development and modernization. In this scenario, Beijing would be able to bolster its efforts to achieve parity with the United States.

What would it mean for western policy?

For the West, this scenario would probably be the worst of the three. A stronger Russian-Chinese partnership or even a formal alliance, where Beijing cares much less about maintaining decent relations with the West, would be likely to result in significantly increased Chinese support for Russia's war against Ukraine, amplifying the autocratic threat to European and to global security. Joint Russian-Chinese technological development and technology sharing would also pose a threat to the West's military advantage, as well as to its interests in areas such as space, AI and emerging technologies.

This would also signify a consolidation of the global autocratic bloc, posing a threat to western interests and influence across various regions, including the Indo-Pacific, the Middle East, Africa and [Central Asia](#). This alignment could also embolden other countries in the “[axis](#) of evil”, such as [Iran](#) and North Korea, especially with support from Russia and China.

On the other hand, it could also lead to – and indeed necessitate – stronger western and Transatlantic unity, resolve and action on how to manage, deter and counter the combined and [coordinated](#) long-term revisionist threats from Russia and China in both their respective theatres.

What speaks for or against it?

Several factors support this scenario. The Russian-Chinese strategic alignment against the West and its liberal world order is likely not only to endure but also to grow stronger if the rivalry between China and the West intensifies in the medium to long term. This is especially relevant in the context of the EU decoupling from China, the United States adopting a more hawkish stance (especially a potential Trump administration), China experiencing increased instability and unpredictability due to economic weakening and political tightening, and the world order solidifying around a global democracy-autocracy divide.

Much [analysis](#) highlights the period 2027–2030 as China's timeline for a potential military solution to the issue of Taiwan, based on its military capacity and political narratives. This means that in the medium term, the heightened risk of a military conflict between China and the United States makes the scenario of closer Russia-China relations more likely.

However, several factors argue against this scenario, not least the numerous and significant limitations and challenges in the relationship which are unlikely to disappear or be resolved. Some may even worsen in the medium term as the war and sanctions leave Russia weaker, more isolated and more internationally toxic, while Russian and Chinese goals and means on the global stage diverge increasingly. Moreover, and importantly, a breakdown in relations between China and the West is far from certain as both sides would incur enormous costs from such an outcome.

Conclusions

Multiple possible futures. The ongoing and future development of Russian-Chinese relations is not set in stone. While many current trends point to a continuation of the status quo in the short term, in the medium to long term, other plausible paths can be imagined to either significantly better or worse relations, based on a variety of crucial factors inside, between and beyond the two countries.

Vital consequences for both Russia and China. Despite the growing inequality in Russia-China relations, their future development will have significant consequences for both Moscow and Beijing. For Russia, it might mean the difference between the long-term survival of its economy and the success of its war against Ukraine and Europe, or military, economic or even regime collapse. For China, it will be an important factor in the failure or triumph of its long-term goals of rivalling, surpassing and replacing the United States as the global hegemon and transforming the liberal world order, especially as this is closely connected to the issue of Chinese-western relations.

Differences in scenario preference and viability. However, which scenario is more desirable, given current circumstances and prospects, probably differs between the two countries. While both countries might be comfortable with a continuation of the status quo, Russia might presumably want a significant strengthening of relations. Moscow has few other partners or allies to rely on and the more Chinese political, economic and military support it receives, the better – despite the increased dependence this would cause.

For Beijing, however, which wants to balance relations with both Russia and the West, such a scenario could mean isolation, sanctions and thus large economic, reputational and manoeuvrability costs. Similarly, while a worsening of China-Russia relations would bring negative outcomes for both, China would probably be able to cope with and even find silver linings in such a scenario, whereas for Russia it could be potentially catastrophic.

Differing levels of agency. Russia and China, as well as the West, can affect the future development of Russia-China relations, although to differing degrees. Russia's options are limited, as it is increasingly reliant on China. How Moscow plays its various remaining cards, however, still matters, including how well it succeeds in boosting various strategic, political, economic and military-technological ties with China; how it fares, and acts, in the war against Ukraine; and how much it can leverage the few things it has that China wants, such as cheap Russian energy, military technology, access to the Arctic and Russian support for Chinese geopolitical ambitions.

China is probably the actor with the most agency in how the relations develop because of Russia's dependence and because China has options. Thus, to a certain degree, relations will develop as far as China allows them to, which in turn partly depends on how China chooses to and succeeds in balancing and navigating relations with both Russia and the West at the same time.

Policy recommendations for the EU and the West

The West must prepare for a range of potential outcomes in Russia-China relations across domains and their impact on western interests, some favourable and some unfavourable. This entails making difficult but necessary choices regarding resource allocation and strategy development to effectively counter and deter the joint Russia-China threat in both the European and the Indo-Pacific theatres and on the global stage beyond.

Importantly, the policy choices of the West will play a crucial role in the future development of Russia-China ties. Moreover, as shown above, there are worse and better outcomes in the Russia-China relationship for the West. The West should therefore pursue several policy approaches that will be crucial to affecting Russia-China ties in an optimal direction *and* that will be vital for securing western interests regardless of the outcome.

- **Accept, face and prepare for a long-term joint Russia-China strategic threat.** The deep and growing ties between Moscow and Beijing are strong and enduring – built on a foundation of joint strategic rivalry with the West. This systemic, global and united threat to western security and interests is unlikely to disappear soon, cannot be resolved through grand “deals” or diplomacy and requires western unity and resolve.
- **Draw the right parallels between theatres and adversaries.** Increasingly, the two theatres of Europe and the Indo-Pacific are interconnected geopolitically for the West in terms of threats, resources and strategies. Just as Russia and China learn from each other in their confrontations with the West, so too must the West draw lessons on the synergies between their malicious behaviour across domains.
- **Build capacity to deter and counter both Russia and China simultaneously in both theatres.** The defence of Taiwan starts in Ukraine, as credible US deterrence and resolve against China is demonstrated by supporting Ukraine’s victory and ensuring Russia’s defeat. Conversely, this dual-theatre capability requires the EU to develop its strategic thinking and culture on deterrence capacity against both adversaries.
- **Strengthen Europe’s capacity to take care of Europe.** Countering both Russia – which is existential for Europe – and China – which is existential for the US – requires that both Europe and the US take primary responsibility for securing their respective theatres. This means Europe becoming serious about its geopolitical agency, not least through massive investments in military and defence-industrial capacity, its competitiveness and technological development, and its long-term capacity to stay united, resolute and independent in the face of Chinese attempts to divide.
- **Transatlantic unity on broad fundamentals.** Unity and close alignment between the US and Europe on how to jointly frame, manage and counter the Russia-China threat, in both theatres and globally, will be crucial for western interests and security. Countering Beijing and Moscow will require close Transatlantic unity and cooperation in various spheres, such as sanctions, democratic resilience, defence against kinetic and hybrid threats, the defence industry, technological development, alliances and multilateral forums, international outreach and diplomacy, and global issues,.
- **Transatlantic dialogue on how to square differences in China policy.** At the same time, for various reasons, the US and Europe are unlikely to be completely aligned on China policy. This need and must not hinder or undermine a coherent Transatlantic strategy vis-à-vis the Russia-China axis. Through dialogue and mutual concessions, both

sides need to find ways to work around difficult questions, as well as differences in priorities and threat assessments, regarding trade and political relations with China.

- **Differentiate between the two partners where necessary.** While their joint threat requires a holistic western approach, Russia and China are different actors with different means and goals, and present different challenges for the West. Russia must be countered and contained wherever and whenever, and holds no value as a potential partner. With China, the West must seek to uphold functioning economic and political relations, not least to resolve global issues.
- **Understand where alignment ends and adapt strategies accordingly.** Despite growing alignment, Russia's and China's positions, interests and prospects diverge in many regions and on many issues. Tracking and understanding the development – and limits – of their alignment will be crucial to properly manage and counter the joint Russian-Chinese threat with differentiated strategies in different spheres.
- **Find and exploit differences where possible.** Russia and China are too close to be pulled apart through “wedges” or a “reverse-Kissinger”. However, the West can and should leverage the many regions and issues where they are misaligned, including in the Arctic, the Korean Peninsula, Central Asia, Russian nuclear sabre-rattling and violation of international law, and potentially also Ukraine and [Taiwan](#).
- **Minimize Beijing's support to Moscow by maximizing the pain.** Western pressure works in affecting Chinese economic behaviour vis-à-vis Russia. Russia-China trade has levelled off in 2024 in response to the pressure from secondary sanctions, as Chinese actors' reluctance has led to severe problems with transactions. The EU must follow the US lead in pressuring both China and other third actors not to enable sanctions evasion by Russia. Credible sanctions enforcement sends strategic signal to China and others.
- **Shore up allies both west and east.** In both theatres, bolstering allies as much as possible against the threats from Russia and China will be crucial to western success and credibility in the global battle against the autocratic axis. In the west this includes Ukraine, NATO's eastern flank and fledgling democracies such as Moldova and Armenia. In the east this includes Taiwan, Japan, South Korea and the Philippines.
- **Expose and counter the flawed Russia-China offer in the global arena.** Beijing and Moscow's alternative vision for the world finds fertile ground due to real grievances, disillusionment with the West, and cheap Chinese loans and Russian hydrocarbons. However, their hollow version of a “multipolar world” – built on contempt for international law – runs counter to the interests of global partners; breeds instability, autocracy and debt traps; and does not provide solutions to global issues such as poverty, inequality and conflict. The West needs to fight Russian-Chinese influence internationally by engaging global partners with diplomacy, clear narratives and real economic involvement.
- **Improve relations with key rising and middle powers between east and west.** Limiting the global influence and options of the Russia-China axis will require building trust with countries such as India, Turkey, Brazil, Kazakhstan and Indonesia, among others. The West's strategic engagement with these states will be central for reasons connected to connectivity, transport, supply chains, energy and resources, trade and sanctions, and diplomatic outreach and clout with the developing world. The West should therefore strengthen its cooperation with these countries through “mini-lateralism”, as well as focused and pragmatic partnerships.



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