

The Looking Glass

Will China arm Russia?

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In this issue of the *Looking Glass*, we take a closer look at recent developments in China's approach to the war in Ukraine, focusing on explaining Chinese behaviour. Our March 2022 *Looking Glass* argued that Beijing was trying to balance its desire to maintain the so-called 'no limits' strategic relationship with Russia against the collateral damage to its interests that could flow from being too close to an increasingly isolated Moscow. We also argued that until that point (i.e. March 2022) Beijing's actions demonstrated this 'straddle' was because China remained a cautious, interests-based actor intent on protecting its diplomatic and economic relationships with the rest of the world. One year on – as [reports](#) emerge that China may provide lethal aid to Russia, in the form of drones and/or munitions – it is appropriate to revisit this judgement.

There are arguably three prominent sets of explanations for Chinese behaviour to date. These can be neatly summarised as power, interests and personality. We suggest however that the centralised and 'stove-piped' nature of decision-making under Xi when *combined* with the peculiarities of Xi Jinping's apparent personal investment in Sino-Russian ties may act against a purely interests-based model of Chinese behaviour. Moreover, a decision by Beijing to arm Russia – and thus to become an active participant in this ongoing crisis – would not only see the floor fall out of its already fraught relations with Washington – by effectively making Ukraine a Sino-US proxy war – but also turn much of Europe against it as well.

Power, interests and personality: explaining Beijing's 'straddle'

In the March 2022 *Looking Glass* we noted that, since the collapse of the Soviet Union, Moscow and Beijing had developed a strong complementarity of interests across the strategic, economic and normative dimensions of their relationship. This complementarity has been strengthened under Xi Jinping's and Vladimir Putin's leadership. Indeed, prior to Russia's invasion of Ukraine, the realities of Sino-Russian ties were beginning to live up to some of the rhetoric about the depth and breadth of relations.

During Putin's 4 February 2022 visit to Beijing, both sides [proclaimed](#) their 'limitless' relationship, alongside the [inking](#) of a US\$117 billion deal for Russia to supply China with oil and gas from the Russian Far East. Defence and strategic cooperation (including arms sales and joint military exercises) have also [continued](#) to expand.



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The immediate impacts of the Russian invasion on the Moscow-Beijing relationship were not a total disaster from China's perspective. In fact, despite being surprised by both Putin's choice to invade Ukraine and (like most external observers) the strength of Kyiv's resistance, the short-term effects of the war in the context of Sino-Russian relationship were positive in terms of arguably increasing China's leverage within the relationship. The sanctions and export controls [imposed](#) on Moscow, for instance, left Russia far more dependent on Beijing as a source of technology, like semiconductors, and as a customer for Russian natural resources.

For some, this has signalled Russia's slide towards becoming the [junior partner](#) in the relationship. This trend is most evident in the energy sector, where Russia [overtook](#) Saudi Arabia as China's leading source of oil midway through 2022. China's economic interest rather than political solidarity has [driven](#) this, as international sanctions on Russian oil 'mean traders have been wary of handling Russian crude, creating a mini-glut'. This has seen Russia trading oil at some US\$20 to US\$30 cheaper than international benchmark prices.

At the same time, Beijing also sought to bolster the no limits rhetoric of Sino-Russian relations through a number of measures. They included [abstaining](#) from the 25 February 2022 UN Security Council vote to condemn Russia's invasion, regularly [asserting](#) its opposition to economic and diplomatic sanctions on Moscow, and its continued promotion of the idea that China and Russia are [building](#) an [alternate](#) international order to that championed by the West. This has been coupled with regular [repetition](#) of Russian narratives regarding the causes of the war in Ukraine.

Over the course of the first year of Russia's war in Ukraine, a strong consensus view on Beijing's 'straddle' by a [number](#) of [knowledgeable analysts](#) emerged. This suggests Beijing [believes](#) that as long as it does not become directly involved in the conflict (e.g. through military aid to Russia) 'it will at most suffer secondary sanctions for its political and economic support'. Meanwhile, the US and Europe will 'shift their gaze away from Asia, giving China a freer hand in its neighborhood'.

Another element which has played a role in sustaining the 'straddle' is worth noting: Xi's apparent personal commitment to Sino-Russian ties. This commitment arguably stems from two major sources: Xi's personal history and experience; and his (and the CCP's) perception of convergent interests and normative commitments with Russia.

Xi's father, Xi Zhongxun, [admired](#) the Soviet Union, as not only the home of the Bolshevik Revolution but also as a source of modern science and technology, necessary for the development of the 'new China' founded by the CCP in 1949. This view was common amongst the highest echelons of the CCP during the 1950s. Xi also shares this admiration, to the [point](#) it constitutes what Yun Sun has termed a 'Russia complex'. This is due to Xi's background as a princeling, growing up during the high tide of the Sovietisation of the PRC's political, economic and military systems, and his education, which was shaped by Soviet/Russian models. It has [expressed](#) itself in contemporary Sino-Russian relations in 'a leader-level nostalgia for the Sino-Soviet partnership' of the 1950s, an admiration for Putin's 'strongman' rule, and a rare but effusive [declaration](#) by Xi that the Russian leader is 'my closest foreign colleague and my best confidant'.

Finally, Xi's and the CCP's [perception](#) of the causes of the fall of the Soviet Union also contribute to the current shared Russian and Chinese views of global geopolitics. The CCP has conducted [multiple studies](#) on the fall of the Soviet Union. The most recent one, published in [2011](#), concluded that the Soviet collapse was not determined by systemic failures within the system, but by the convergence of imprudent 'reformism' within the Soviet Communist Party under Gorbachev and US efforts to achieve the 'peaceful evolution' of the Soviet Union into a democracy. Xi himself has repeated this assertion on a number of occasions since

assuming the role of General Secretary of the CCP and President of the PRC. In essence, Xi sees Russia and China as sharing similar domestic and systemic threats or challenges to their regimes and views close Sino-Russian ties as a means of combating Western (i.e. US) led efforts to constrain them.

This is also consistent with an understanding of what it is that Beijing believes it gets out of Sino-Russian relations more broadly. Xi's driving agenda has been the 'struggle' to [attain](#) the 'China Dream' of 'great national rejuvenation'. The primary [obstacle](#) the CCP sees standing in the way of that objective is a truculent and declining US hegemon. Close Sino-Russian ties, from China's perspective, are thus [judged](#) to be important, so long as they [contribute](#) to China's economic and military strength, and assist in constraining the US.

This is certainly a calculation that has served China well during times of peace. But the longer the war in Ukraine continues, the higher the risk that the alignment with Russia will in fact work against attainment of Beijing's overall objective of overcoming American hegemony. As we have noted, Beijing's calculus to date has become conflicted, and to an extent contradictory. It has sought to maintain its alignment with Moscow but to do so in such a way as to mitigate the potential risks to its interests of too close an embrace of its partner. Arming Moscow now would not only unravel relations with Washington and the majority of European capitals but also damage China's diplomatic standing and reputation globally.

China arming Russia: how and why?

China's previous effort to maintain the 'straddle' is why recent reports that Beijing is considering provision of military aid/materiel to Russia are both puzzling and disturbing. US Secretary of State Antony Blinken [asserted](#) after his meeting with Wang Yi on the sidelines of the Munich Security Conference on 19 February that, 'There are various kinds of lethal assistance that they are at least contemplating providing ... [including] weapons'. And, he warned his Chinese counterpart against assisting Moscow with 'systematic sanctions evasion'. [Der Spiegel](#) then reported on 23 February that the 'Russian military is engaged in negotiations with Chinese drone manufacturer Xi'an Bingo Intelligent Aviation Technology over the mass production of kamikaze drones for Russia'. Finally, CIA Director William Burns [noted](#) in a wide-ranging interview with US television network CBS they were 'confident that the Chinese leadership is considering the provision of lethal equipment', before acknowledging 'We also don't see that a final decision has been made yet, and we don't see evidence of actual shipments of lethal equipment'.

Setting aside the (certainly real) possibility that the US claims are a form of signalling, designed to indicate to Beijing where American red lines for Chinese support for Russia are, this raises some important questions. First, which aspects of China's previously cautious calculus might change – or might be changing – for it to favour becoming directly involved in the conflict by providing over military support for Russia? Second, how might Beijing seek to do it?

How might Beijing arm Russia?

The war in Ukraine, as many observers have [noted](#), has become attritional. Such a conflict puts a [premium](#) on both manpower and materiel. In the balance of forces between the two protagonists, it is clear that, while Moscow has the advantage in manpower, Kyiv holds an advantage in materiel, given the US and European supply of advanced munitions and technology to the Ukrainian military.

In other words, the type of war Russia has engendered in Ukraine automatically makes it more reliant on China for technological assistance, especially given that Western sanctions make sourcing equipment from its European markets impossible. Russian trade data has [shown](#) Chinese state-owned defence companies have already exported navigation

equipment, jamming technology and jet fighter parts to Russia, while another Chinese company has been [sanctioned](#) by the US government for supplying satellite imagery to the mercenary Wagner Group.

China's potential supply of munitions to Russia, however, could be of much greater impact and play a role in shifting the balance of forces. It is no [surprise](#) that 27 of the top 100 arms manufacturers in the world are European, and 40 of the top 100 are American – many of which have been [harnessed](#) by US and European governments to supply Ukraine. Yet Chinese arms manufacturers now account for eight of the world's top 100 arms manufacturers. Of those, four rank in the global top ten (NORINCO, AVIC, CASC and CTEC). In particular, NORINCO (a land-systems specialist) and AVIC and CASC (military aerospace specialists) would appear to have the most potential to contribute to Russian needs.

But this does not automatically mean large Chinese manufacturers are the only key to supplying Russian technology needs. It is worth noting that the company reported by *Der Spiegel* as potentially making drones for Russia – Xi'an Bingo Intelligent Aviation Technology – is not one of these big players at all. It is far smaller: a relative newcomer to the sector, established in 2017. The company itself too has [denied](#) having any commercial contact with Russia or Russian entities.

The type of drones sold by Xi'an Bingo are effective and similar types have been used by the Russians on the battlefield. But already as [Dennis Wilder](#) (former National Security Council director for China under the George W Bush administration and former CIA deputy assistant director for East Asia and the Pacific under the Obama administration) suggests, another possibility is that Russia may seek artillery shells from China. Russia, as evidenced by its [reported](#) efforts to obtain artillery ammunition from North Korea, is running short, so much so that it has provided only [limited fire support](#) for its 'human wave' assaults on the city of Bakhmut. [China](#), meanwhile, has a massive capability to produce and supply artillery shells. In contrast to drones, Wilder [notes](#), there is almost no way to tell where an artillery shell comes from, and this could provide Beijing with sufficient plausible deniability to covertly assist Russia.

Why might China arm Russia?

The much bigger question is why Beijing would choose such an option? To answer it requires an examination of whether the conditions that have determined Beijing's 'straddle' to date have changed sufficiently to prompt such a high-risk approach.

Here, there are two bodies of evidence. The first concerns China's diplomatic undertakings. On balance, they suggest Beijing still desires to have it both ways on Ukraine, by posing as a 'neutral' party while simultaneously remaining wedded to its alignment with Russia. The second body of evidence (but one that is more fragmentary than the first) is how Beijing might perceive a weakened or perhaps even defeated Russia as deleterious to not only China's interests but its core security concerns. Crucially, this – for reasons we will set out below – rests on what we characterise as the 'stove-piped' and personalised nature of decision-making at the highest levels of the CCP.

Wang Yi's recent diplomatic foray in Europe is apposite of the first body of evidence. With an [itinerary](#) including attendance at the Munich Security Conference (MSC) and visits to Paris, Rome, Budapest and Moscow, Wang's objective was to reinvigorate both economic ties and diplomatic relations with Europe, as its relations with the US continued to deteriorate and [break out](#) of its 'Covid zero'–induced economic slowdown.

Wang demonstrated that Beijing's strategy to overcome the obvious division in European and Chinese views on the war in Ukraine is to couple reiteration of its existing position of [principled neutrality](#) with an overt effort to flatter European sensibilities about their relative weight in the

world. In this latter respect, Wang's meetings with President Macron in Paris and also German Chancellor Olaf Scholz in Munich were instructive. Here, Beijing's chief diplomat underscored that China saw both [Paris](#) and [Berlin](#) as independent and responsible world powers that 'shoulder the shared responsibilities for maintaining world peace and addressing global challenges'.

During his address to the MSC, Wang stuck to this approach. On the war in Ukraine, Wang [reiterated](#) Beijing's position that it 'adopts a responsible attitude towards international disputes and plays a constructive role in accordance with the merits of the matter itself'. As such, 'China's policy on the Ukraine issue boils down to one sentence: persuasion and talks', which would form the basis of a soon to be released Chinese position paper 'on the political settlement of the Ukrainian crisis'. Prompted for more details on this during Q&A, Wang [provided](#) little that was new. Rather, the MSC audience was [treated](#) to the familiar talking points that resolution of the war must be based on respect of the 'sovereignty and territorial integrity of all countries', the 'principles of the UN Charter' and consideration of 'the legitimate security concerns of all countries' party to the conflict.

However, this did provide an opening for Wang to take both a swipe at Washington and attempt to encourage Europeans to seek and grasp 'strategic autonomy' (i.e. lessen their reliance on the US). 'Some people', Wang [suggested](#), 'do not want peace talks to succeed or fighting to stop', as they 'don't care about the life and death of Ukrainians or the harm done to Europe, but have larger strategic calculations in mind'. In this situation, Wang continued, 'We hope European friends will give sober thought to these questions: what kind of efforts are needed to stop the war? What kind of architecture is needed for peace and stability to endure in Europe? What kind of role does Europe need to play to realize its strategic autonomy?'

This dualism was also evident in the 12-point [Chinese peace plan](#) for Ukraine that was released on 24 February. It contained a warning to Russia that China would not tolerate the use of nuclear weapons, and an insistence that nuclear power stations were not endangered by the fighting. But it also included some thinly veiled criticism of the West, including the claim that all sanctions regimes should be dropped, and that the conflict was a manifestation of a 'Cold War mentality' in which the security of a region could not be attained by 'strengthening or expanding military blocs'. Moreover, the lack of specificity in the document – which was long on aspiration, but short on details about how peace would be achieved – was a marker of the contradictions associated with Beijing's straddle diplomacy: that its attempts to cater to both Russia and the West meant that it had very little meaningful to offer about the resolution of the war.

This means that recent Chinese overtures to the West, and especially Wang's approach at the MSC, have been flawed on two counts. First, they reveal an [overestimation](#) of European capitals' desire to remain at arm's-length from deepening Sino-US rivalry. Second, they have revealed an [underestimation](#) of the impact the Russian invasion of Ukraine has had on European security postures and perceptions. While European capitals [are](#) 'uncomfortable with some of the more hawkish rhetoric towards China that is coming out of Washington these days, notably in relation to Taiwan', Beijing 'should know better than to try to woo Europe by bashing the United States' at a time when European security concerns are firmly focused on Russia's war against Ukraine.

It is therefore clear that ambiguous Chinese peace plans and its attempts to woo European leaders have failed. That European capitals would now distance themselves from Washington appears almost inconceivable, especially as Beijing is currently offering little in return on the most pressing security issue for Europe: the war in Ukraine. In fact, for some European capitals Beijing is an increasingly problematic actor, given [evidence](#) that Chinese companies and entities have been a major source of dual-use technology and components for Russia in the face of US and EU sanctions.

Arming Russia? All eyes on the prize

China's continued desire to have it both ways on the war in Ukraine dovetails with what an external observer would understand as a purely interests-based assessment of its behaviour. And, in weighing the pros and cons of arming Russia, it is difficult to arrive at anything other than the conclusion that doing so would significantly harm China's interests.

But that is not necessarily the full picture. As we noted in the March 2022 *Looking Glass*, analysts must be careful about projecting our own sense of rationality onto Chinese decision-makers in Zhongnanhai. This is because such leaders operate in a political and ideological environment that conditions available policy options. Most significant in the Chinese context is the centralisation of foreign and defence policy under the direct leadership of Xi Jinping (and a very small group of other senior leaders) and Xi's close political and personal investment in Sino-Russian relations.

With respect to the former, Xi has placed himself at the [heart](#) of the most consequential state and Party bodies. In addition to his roles as CCP General Secretary and President, he is also chair of the Central Military Commission, the National Security Council, and heads the most important [Small Leading Groups](#) (SLG) of the CCP Central Committee. These are related to foreign policy, such as the Foreign Affairs SLG and Taiwan Affairs SLG.

Such centralisation has provided China with the capacity to make more rapid and efficient decisions than before. But it also makes it an inherently stove-piped process, because Xi is the only authoritative leader who can coordinate and act on information provided by these various leading foreign-policy-focused state and Party bodies.

Xi's political and personal commitment to Russia also exacerbates the problem of stove-piped decision-making. Most crucially, Xi's Russia complex has [resulted](#) in a 'selective bias in his judgement about Russia's national power' where he is prone to overestimating Russia's strengths and reliability, while underestimating its weaknesses and the risks posed to China.

Significantly, this tendency appears to have been recognised by well-connected Chinese analysts, who have mounted criticisms of the official approach to Sino-Russian relations and the war in Ukraine from several angles.

For example, Feng Yujun – a lead analyst of Sino-Russian relations for Fudan University – has implicitly [critiqued](#) such a Russia complex in a recent essay. Feng [argued](#) that 'many Chinese elites have not yet soberly realized that there has been a historical reversal in the comprehensive national power of China and Russia. Although our national power is ten times that of Russia, many people's minds are still subservient to it', and as a result China is 'basically led by the nose by Russia'. Such a mindset, he [continued](#), has enabled Russia to manipulate China in the US-Russia-China strategic triangle by 'mobilizing' Sino-US 'contradiction' to persuade China that it needs close alignment with Russia to mitigate worsening ties with the US. He concludes that, while China should desire 'stable and constructive' relations with Russia, it in fact requires that type of relationship with Washington more, as that relationship will 'determine China's overall international environment in the future'. Interestingly, it has now been [reported](#) that the US intelligence source(s) for the information obtained by *Der Spiegel* have come from Russia. This raises a possibility that the Russians – as per Feng's argument – may be attempting to force Beijing's hand by disseminating such information.

The upshot is that while China should desire stable and constructive relations with Russia, it requires an ongoing relationship with Washington because it will determine China's overall international environment in the future in ways that Xi's partnership with Putin will not. How China navigates its diplomacy with respect to the US will shape global access to trade and resources, determine China's relative weight in terms of global supply chains, and affect US

policy and posture close to home – in the South China Sea, around Taiwan and in North-East Asia.

Crucially, all of these vital Chinese interests would be negatively affected by a decision to arm Russia, including its critical relationships with European actors. It would mark the end of Chinese strategic ambiguity and usher in a fully-fledged era of great power competition at a time dictated by Vladimir Putin, rather than one of Beijing's choosing.

Others, such as Ding Xiaoxing, the Director of the Institute of Eurasian Studies at the Ministry of State Security's Chinese Institute of Contemporary International Relations (CICIR), are more circumspect in their criticism. Ding [noted](#) in a 25 February post for CICIR's blog that the 'West is fully involved' in a 'hybrid war' against Russia through the provision of money, arms and diplomatic support for Ukraine. Russia's military and economic setbacks and the West's successful support of Ukraine, Ding suggests, means that the war has reached a point of stalemate in which 'none of the parties can win', but they also 'can't afford to lose'. This is because Putin has framed the 'special military operation' as an existential conflict for the future of Russia, while the West too has increasingly declared this to be 'a confrontation that cannot be lost', as 'losing means that the decline of the West will accelerate, and the international order dominated by the West and the so-called values of "democracy and freedom" will be shaken'. Crucially, there is thus little scope for the type of negotiated settlement of the conflict that Wang Yi has just been touting during his European trip.

Finally, Hu Wei – a researcher affiliated with China's State Council – is even more explicit than Ding Xiaoxing in dismissing China's official peace plan for Ukraine. Hu bluntly [notes](#) that 'the paper contains no specific implementation plan or any operational measures', while its call for 'removing unilateral sanctions' (i.e. removing sanctions on Russia) means that there is no chance of the West or Ukraine agreeing. 'Even Russia', Hu continues, 'says the document does not reflect its positions.' He concludes, 'China is in a dilemma with not much room to maneuver politically', as both 'the battlefield momentum' and 'moral advantages' are now 'both in the hands of Ukrainians'. In what can be read as implicit advice to China's leaders, he argues that while decision-makers cannot 'avoid making mistakes' the 'only difference between wise decision-makers and foolish ones is the ability to learn from past errors, reverse wrong policies in a timely manner, and stop the losses as early as possible'.

These critiques demonstrate that Sino-Russian relations, and China's position vis-a-vis the war in Ukraine in particular, are generating some level of disquiet. Combined with Wang Yi's recent diplomacy, it also lends weight to the argument that Beijing will likely try to persist with its straddle diplomacy for the time being. But it is dangerous to make such predictions with too much confidence. As we have demonstrated above, the centralised nature of CCP decision-making coupled to Xi's personal investment in close ties to Moscow have their own dynamic independent of what we might conceive of as rational geopolitics and geoeconomics. It may well be, therefore, that these internal forces win out – and that China decides to show its hand by arming Russia sooner rather than later.

Further reading

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