November 25, 2026

EXPERTS TAKE

‘A protracted Ukraine war keeps U.S., Europe distracted while providing PLA cost-free learning’

An Interview with Roy Kamphausen

In this Experts’ Take, conducted by Lisa Bruining and Gustav Bremer from ISDP’s Asia Program and Stockholm Center for Research and Innovation Security (SCRIS), Roy Kamphausen examines how Beijing is reading the war in Ukraine, the conflict in Iran, and the growing strategic competition with the United States and Europe. He also discusses what these developments mean for the Taiwan Strait, the Korean Peninsula, and China’s nuclear expansion.



Mr. Kamphausen is Senior Fellow for Chinese Security at the National Bureau of Asian Research (NBR), where he previously served as president. His career includes serving as China policy director in the Office of the Secretary of Defense under Donald Rumsfeld, Military Attaché to the U.S. Embassy in Beijing, and as China policy chief for the Chairman of the Joint Chiefs of Staff. He joined ISDP recently for a roundtable on Chinese strategic thinking and the PLA’s growing

military capabilities. Following the roundtable, where Mr. Kamphausen discussed China's concept of Comprehensive National Power (综合国力) and the U.S. "not today" approach of deterring the PLA from acting against Taiwan in the short term, we continued the conversation by asking him for his analysis on Xi Jinping's relationship with Vladimir Putin and Kim Jong-un, the lessons China draws from the war in Ukraine, Beijing's gray zone approach toward Taiwan, and the implications of China's rapid nuclear build-up. In this interview, he argues that a protracted war in Ukraine serves China's interests, assesses what Beijing is and is not learning from Russia's performance, and explains why China has proven a limited partner to Iran.

Gustav: How strong is the relationship between Xi and Putin? How much has China's cooperation with Russia been impacted by the war in Ukraine?

Roy: How else would you characterize them except as friends? They've met 50 times over the last 13 years. Putin and Xi met three weeks before the February 2022 Russian invasion of Ukraine, and that's when they declared the so-called "partnership without limits." I find it implausible that Putin wouldn't have said to Xi at their meeting, *"You know, we're going to do this limited... special military operation and it'll wrap up in 3 or 4 days. I just wanted you to know."*

With regard to the invasion, I'm sure Xi didn't like the prospect on one hand, because it introduces instability into a situation in which stability is his principal interest. However, as the war has dragged on, and the Chinese got over their disappointment at the inability of the Russians to bring about a satisfactory outcome, PRC opinion shifted, and I think the PRC is now quite happy with a protracted conflict. They want Russia to win the war, but slowly. Quite apart from the horrible sacrifices that the people of Ukraine are having to pay, at a geopolitical level, a protracted war is good for China, and it might also be good for the Russians. Because it's not clear that Russia can survive without the war; its economy likely can't survive, except with its wartime footing.

In addition, the war is good for North Korea, who made the unexpected decision to deploy troops and sell ammunition to the Russians, and the DPRK are now net winners in Northeast Asia. North Korea is arguably more secure than it has ever been in its history. And if Kim Jong-un were to say to President Trump, *"I want you to acknowledge our status as a nuclear power before I agree to a meeting. I want to have some assurances that you think of us as such."* I worry that the American side would come very close to acknowledging the DPRK's changed status. In any case, there appears to be a de facto acknowledgement in the American approach. Russian support for North Korea has given them leverage against America, to some extent, and even more against the PRC. It has diversified their economy. And so, North Korea is as confident and secure as they've ever been, certainly in Kim Jong-un's period, and maybe in the entirety of their history. The looming question on this front is, does a more secure North Korea become less revanchist, less provocative, less of a security threat to the Republic of Korea, to Japan and to the greater region? Or does it become emboldened? And I tend to think they become the former; they become more of a status quo power. It's hard not to call them a nuclear power if they

have nuclear capability, and Xi Jinping hates that. That's why he went to Pyongyang.

Remember in 2018, before Kim met President Trump in Singapore? What did Xi do? He called Kim to visit him in Dalian the month before. You see the pictures of them walking along the promenade; it appears that Xi can't stand Kim. Yet, for strategic reasons, Xi meets Kim because he must have some assurance that Kim's not going to give everything away to the Americans when Kim meets Trump. The very act of Xi trying to get assurances from Kim Jong-un gives Kim Jong-un more leverage, and that's a guy who knows how to deal with leverage. There is only one thing I like about a potential Trump-Kim meeting. It's not about what we might accomplish bilaterally, because I don't think there's anything to be accomplished. We're not going to get them to walk away from nukes. And I think the reason that Trump curtailed the military exercise with the South Koreans just last month (August 2026) by a few days, was a message to Kim, it wasn't a message to South Korea. The benefit of a Kim-Trump meeting is the pressure it puts on Xi Jinping, because now, suddenly, Kim is a real player. He's got Russia, he's got America, and he is less dependent on the PRC. And the PRC has always said to us, as Americans, we have no control there. And now it's really happening.

Lisa: When it came to the agreements between the DPRK and Russia, China was barely informed. The DPRK seems to be getting into a much closer pact with Russia. How is Xi feeling about that?

Roy: He doesn't like it. He may like it at the level on which it prolongs the war in Ukraine. He doesn't like it at the level of Kim becoming emboldened and having more confidence and leverage against him. I think it's not hard to imagine a scenario in which, and maybe it was in that conversation in early February 2022 before the invasion, Putin said to Xi Jinping, *"You don't want to send PLA troops, do you?"* Now, there's very little chance that Xi would have ever done that, as that really runs counter to Chinese interests more broadly. But he could hardly argue that North Korea shouldn't do so when he was offered first. One last point, when Xi went to Pyongyang in June 2026, he reportedly talked about military support to North Korea, which is at least the very first time Xi Jinping ever talked about that, and I think maybe the first time since the Korean War. I have done a fair bit of research

The war is good for North Korea, who made the unexpected decision to deploy troops and sell ammunition to the Russians, and the DPRK are now net winners in Northeast Asia. North Korea is arguably more secure than it has ever been in its history. And if Kim Jong-un were to say to President Trump, "I want you to acknowledge our status as a nuclear power before I agree to a meeting. I want to have some assurances that you think of us as such." I worry that the American side would come very close to acknowledging the DPRK's changed status.

on PRC and DPRK military interaction, and it has been very little historically—no exercises of any consequence, just some border deconfliction stuff. I think that the PLA has long prepared for what it would do in the case of an impending North Korean demise, and I've read the documents that talk about the establishment of refugee centers run by Chinese security elements in North Korea. There was no meaningful discussion of what the PLA would do to prop up the regime, though we can safely assume there were plans of some sort.

Now Xi is publicly, if reluctantly, offering Chinese military support. Again, this strengthens Kim's hand, but Xi feels compelled to do it because Kim now has the Russian option.

Gustav: Do you think, having seen what happened with the Russian invasion, Xi Jinping became less confident about China's strength vis-a-vis Taiwan, as well as the PLA's and the Chinese intelligence services' readiness to succeed in any sort of operation in Taiwan?

Roy: I tend to think not. The PRC's judgment, and maybe even Xi's own judgment, is that the Russians did poorly and the PRC and PLA would have done better, if given the same mission. So, it's not clear to me that they learn a lesson about the risks of war. I'm sure some colonels and senior colonels in the academy of military sciences have learned this point. But I'm not sure the Chinese top leadership has learned that war is tough. After all, your plans end at first contact with the enemy. I would be delighted if the Chinese system judged, *"wow, we need to give this another thought."* Things don't always go as they are imagined. I would like to think that some reflection would be the case. But I'm not persuaded of this because I think that they think that they would have done better in Ukraine. And so, the lesson they are learning early is Russian incompetence, not the difficulties of combat, more generally.

Gustav: When it comes to military cooperation, what do the Chinese want to learn from Russia? How has that developed since the start of the invasion?

Roy: I sometimes separate this into three categories. I think the Chinese are dismissive of Russian tactics and the ability to support themselves at the tactical level, say at the division level. At the operational level (corps and above) the Chinese have a lot to learn, because they have not had to fight at that level since 1979. Now, the kind of fight they might have to be involved in, Taiwan being the best, if only, example, is a tactical and strategic fight. It's not really an operational fight. They will mobilize enough forces to make it look operational. But the size of the battle space is not so big. So, I don't think they're learning a lot at that level. I think what they're probably learning the most is at the strategic level. As demonstrated just before the invasion, American President, Joe Biden, said, *"Well we're not going to send troops,"* likely out of concern for the risk of nuclear warfare. Now, most American strategists judge that it was the right decision, but the wrong means of delivering it. It should not have been a public statement. Because now Biden was handcuffed by his own statement, thereby giving Putin more leverage. I'm sure for Xi, and the wider Chinese system, that's going to be a part of their own strategy regarding Taiwan, since now they have evidence of a lack of American determination.

Gustav: You hinted at it already, but among the few lessons China is willing to study from Russia, how much do these really reflect what the Russian armed forces report to the PRC directly? How much does the PRC trust the Russians to report accurate information?

Roy: I believe there are Chinese observers, PLA

observers, in both Moscow and in the operational areas of Ukraine and Russia. I don't have evidence for that, but I'd be shocked if that's not the case. I think the Russians would probably like that, even though those judgments might be critical of them. It enmeshes China in the fight at some level. Now, if we had PLA casualties, that would be a whole different situation, and there may have been, but we just don't know about it. We know they're not fighting though; they are observing. That helps them to circumvent the problem of inaccurate information. I just have to believe it is happening. And frankly, if it's not, it's to the PLA's detriment.

The nature of the conflict began to shift when North Korean troops entered the fray in 2024. It's around that time when autonomous drone warfare became prominent, if not dominant. And now, PRC, and the PLA's, interest is very much focused on how the warfare is evolving. Ukraine therefore serves as a battle lab for the PLA.

They want this to play out and see where it goes. It's cost-free learning for them. And that's a little troubling because it means that there are no incentives for any of the parties in this conflict to end it. We tend to think the Ukrainians are noble, and I think they are. Their reason for not ending is patriotic; they are fighting for their survival. The Russians can't end until Putin says he has achieved his political objectives. And the Chinese don't want it to end because they love that the Americans and Europeans are distracted. This is not a reason solely to continue the conflict, but as long as the conflict continues, the Chinese are glad to see how the future of warfare is revealing itself, which can inform their own processes.

Lisa: You have mentioned the "not today" strategy of the U.S. regarding Taiwan, which focuses on discouraging the PLA from taking action in the short term. You also mentioned that the PRC's focus regarding Taiwan is more "gray zone" rather than purely military. What kind of international or internal situation in China or Taiwan would provide for a window of opportunity to expand these gray zone activities?

Roy: The question is, what will the current style of gray zone warfare evolve into? And my own thinking on this is that we are approaching, and maybe already in, a gray zone 3.0 era, in which the PRC combines legal warfare with shifting security tactics on the water and in the airspace. I think that's coming, I don't think there's a trigger for that to happen.

The Chinese frequently talk about "windows of opportunity." I tend to think they use them

There are no incentives for any of the parties in this conflict to end it. The Ukrainian reason for not ending is patriotic; they are fighting for their survival. The Russians can't end until Putin says he has achieved his political objectives. And the Chinese don't want it to end because they love that the Americans and Europeans are distracted. This is not a reason solely to continue the conflict, but as long as the conflict continues, the Chinese are glad to see how the future of warfare is revealing itself, which can inform their own processes.

more in the strategic context than the tactical. They do what they're going to do. And so sometimes I think they proceed with their plans irrespective of whether there's a window or not at the tactical level. And at the strategic level, it's much more amorphous to talk about a window of opportunity. I think people typically would answer your question by saying, well, if Taiwan does something provocative, or if the PRC perceives that it is in a weaker situation, or if it perceives that trends in Taiwan are so negative then they will have to intervene. At the moment, Taiwan is avoiding the obvious provocative language. They're not declaring independence. President Lai says things that Beijing really doesn't like, and it sounds independence minded. But he's not talking to Beijing when he does so; he is talking to his own domestic constituents. The Democratic Progressive Party (DPP), President Lai's party, wants him to be much more forward leaning on independence. I think there's some sort of tacit agreement in Beijing that it's okay for now though.

Beijing also thinks he's a fragile, limited president. They think the recall election effort of last summer revealed his inadequacies as a political leader. They think that the Kuomintang (KMT) has a future. That's difficult to believe because that party appears to be in disarray. But even so, that's for the people of Taiwan to sort out. The visit of Cheng Li-Wun to Beijing as KMT chair allows Beijing to imagine a future in which the KMT could be the party in power. And it allows the PRC to then think that there might be a peaceful pathway forward. And that's okay, that's part of "not today", and, frankly, nothing that any American can do anything about. But if it allows Xi to think that it could happen, then it's not bad.

Gustav: Considering the media reports we've seen about U.S. Patriot and THAAD interceptor shortages due to the war in Iran, do you think that Chinese political leadership views this as an opportunity to become more aggressive in the Taiwan Strait, or will they just wait for another window?

Roy: As mentioned before, I don't think they are poised to take action. If the PRC really were prepared to attack, then they might be looking for any marginal improvement in their odds, but that's really the only scenario that would result in them thinking that fewer THAADs in the region or fewer Patriots would be to their advantage. I think they are simply not ready and so they can't get ready in time to take advantage of the shortage. I think they are making bigger judgments, however, and maybe not mistaken ones, that the U.S. doesn't know how to control its arsenal. There has been reporting of a mismatch of munition against target. In many cases, commanders may have chosen the most advanced option rather than a good enough option against targets in Iran, and so now here we are. The Chinese are certainly going to analyze the decision process that led to that shortage and figure it into their own planning. But it does not in and of itself provide the initiative to proceed with an otherwise still very risky operation against Taiwan.

Lisa: In the U.S.-China trade war of last year in April, we have seen that China has used export controls as leverage in negotiations. Do you think that the U.S. and Europe have responded adequately to prevent this in the future?

Roy: As a non-expert on trade issues, it seems that the Chinese really surprised the Americans in this instance. In the long run, maybe they did us a service, because access to rare earths is

China is quite comfortable sharing technology that would aid an adversary of the U.S. or the West. They care about having their "fingerprints" on any support, however. They really want such support to be distant and through intermediaries, and they don't want the blame to come back directly to themselves. I think it is also clear, in my view, that they will never provide the most advanced capabilities of their system.

a vulnerability that we all knew, and now they have made it explicit. There are serious efforts underway in the U.S., in multiple departments, to address the rare earth shortage issue. And there's still risk in the near term, as these are not months-long efforts that will result in a positive outcome, they are years-long efforts.

We'll have to make accommodations on environmental issues domestically. But much as the American sanctions on Chinese chip acquisition have accelerated the PRC process of acquiring or diversifying their own sources for advanced chips, PRC export control pressure has done the same for the American system. The question is, one, will we seize the moment and accelerate our diversification? And two, when might technology development potentially make rare earth mineral supply issue a non-issue? For instance, I've been reading about sodium-ion batteries, which are, in some cases, better, and so it's just a matter of when and how we can scale up production. So, like the American side, the Chinese may have made an important near-term statement and accelerated the process of supply chain diversification for a few years. But it is nevertheless still an important point of leverage at the moment.

I don't think U.S.-EU relations are sufficiently productive on these sets of points. It feels like the U.S. and the EU are moving to a place where they will stand up more to China. And we hope that's the case. But it remains to be seen.

Gustav: There have been reports that China and Russia are providing Iran with satellite data, for targeting U.S. assets in the Middle East region. What do you think that the Chinese want from this arrangement? And do you think that there's anything that could be done to hold the PRC accountable or halt these activities?

Roy: So, the first question, is it true? I tend to think there's some merit to it. It's not new behavior on the part of the PRC to do risky things, which if fully attributed to them, puts their bilateral relationship with the U.S. at risk. It is plausible from my perspective. We're desperately looking for one, but I don't imagine we'll be able to find that smoking gun. Or, put differently: if President Trump were to say to Xi, listen, here's the signals intelligence collection, imagery and analysis and, then say, "*you have to stop it,*" the Chinese will have an explanation, and they might change their behavior as a direct response, but it won't be a permanent change. Because, to get back to the Russia conflict, the PRC likes the fact

that the U.S. is entangled in a protracted conflict.

In my own view, the aerial bombardment of Iranian nuclear related targets during the summer of 2025, was a brilliant success, in terms of achieving deterrent value: The actions were limited, focused, relatively small civilian loss of life, pure military or strategic targets involved, and it ended quickly. This year, not so much, as the war has become protracted.

The war in Iran has morphed into a new kind of hybrid economic warfare, in which petroleum plays a huge role. China is doing okay in part because they imagined a future in which oil supply might become constrained. A decade ago, the PRC had no strategic petroleum reserves. The U.S., among others, said, *"you really should do something about that,"* and so, they did. Now they're going to weather this storm in part because they followed what others had recommended. Every country has to think about that too. China didn't just build up a petroleum reserve because the U.S. said, "you need one," but their vulnerability was striking then, and now their capacity to weather the storm is also striking. The short time they took to accomplish a reduction in their vulnerability was remarkable.

From a military and strategic perspective, China has proved a mostly useless partner to Iran. Remember, around five years ago, they had this grand announcement of a so-called "comprehensive strategic Sino- Iranian partnership"? It has turned out to be largely meaningless in this war except if they're providing the satellite data to Iran, which I don't have trouble believing at all. Nonetheless, that support is still not very significant relative to the lofty rhetoric about the partnership.

In the grand scheme of things, if you're imagining China being your great partner, you need to think again. They don't take on mutual obligations. There is no concept of having an Article 5 style treaty obligation in the PRC. When it comes to China's great friend in Latin America, Venezuela, the PRC did absolutely nothing to support Maduro in the face of American pressure. Now, I'm not legitimizing the capture of Maduro and bringing him to New York from an international law perspective, but the PRC was of absolutely no value to Venezuela in that instance. And they're never going to be. As a country, you have to have minimal expectations of how they will support you, if you take adventurous actions. They will take advantage of your decisions for their own benefit; they are good at that. They will likewise not act as a responsible actor. PLA Navy commander Admiral Wu Shengli is reported to have told an American counterpart, *"Well, why would we ever want to take your place as the global policeman? You like it, and it's good for us that you do it. So we're never going to think about it….. Don't ask us to be responsible…. This is not a case in which responsibility matters at all. You're not even doing what's in your own strategic interest, but we are not going to get in the way of that."*

Gustav: Considering the way China treats its partners, do you think that there are certain things China is still willing to share, such as technologies or weapons, with American adversaries in the short to medium-term for temporary gain? If so, what are China's limits to this?

Roy: I think they are quite comfortable sharing technology that would aid an adversary of the U.S. or the West. They care about having their "fingerprints" on any support, however. They really want such support to be distant and through intermediaries, and they don't want the blame to come back directly to themselves.

I think it is also clear, in my view, that they will never provide the most advanced capabilities of their system. Someone could make a case that it is good to give your new capabilities a test drive in somebody else's conflict, but they're not going to do that.

They're going to do to other countries the way Russia did them in the 1990s and 2000s when the Russian defense industry was on the ropes. It was in terrible shape after the fall of the Soviet Union, and Chinese PLA orders are what largely kept those defense companies alive. Even so, they (Russia) refused to sell the most advanced systems to China when China would have readily paid for them out of security ramifications for Russia itself. That Russian logic then has now become the Chinese logic today.

Lisa: According to Pentagon reports, China has been increasing its nuclear arsenal rather quickly. Do you think there have been any contemporary reasons to speed up production, or is it more of a long-term goal that had already been planned?

Roy: The American system is totally focused on trying to understand the "why" of PRC nuclear expansion. I say we should also be focused on what it means, and what the implications are.

There are different explanations for "why" China has increased its nuclear arsenal. One is that China is a great power, and great powers have lots of nukes. It's a status thing. A second explanation is that having a higher level of nuclear weapons proficiency allows a country to do more in the conventional space because of the threat that one might escalate and retaliate.

Those are the two most prominent. So, you go from a few 100 to maybe 1000, the U.S. Department of Defense says, a 1000 by 2030 and as many as 1500 by 2035. The New Start Treaty of 2010 limited the U.S. and Russia to 1550 deployed strategic warheads, and both sides appear to be adhering to that limit still. Since the mid-1990s, the U.S. has tried to get China into arms control dialogues. We tried to turn it into a trilateral negotiation between the U.S., Russia, and China, and Beijing resisted. They said, *"Why would we accept limits on ourselves when you guys are so much ahead of us, you and the Russians?"* And all along, we feared that there would be a moment in which they pursued this rush to parity, where they could rapidly produce, develop, and deploy warheads. And now that's what appears to be taking place.

There are different explanations for "why" China has increased its nuclear arsenal. One is that China is a great power, and great powers have lots of nukes. It's a status thing. A second explanation is that having a higher level of nuclear weapons proficiency allows a country to do more in the conventional space because of the threat that one might escalate and retaliate. We need to be thinking of the implications more than simply answering why the PRC chose this time to accelerate its own nuclear weapons deployment.

We need to be thinking of the implications more than simply answering why the PRC chose this time to accelerate its own nuclear weapons deployment.

So, what are the principal implications of this large nuclear arsenal? They've clearly changed from their posture of a minimal deterrent. It is at least a medium-sized and probably a superpower-sized deterrent now. They are probably revisiting their no-first use doctrine as well and maybe even considering a launch-on-warning type of doctrine. Their strategic systems are de-mated typically, so that will have to change as well if they move to launch-on-warning—you can't have a launch-on-warning if your warheads are over there and your launchers are over here.

The more consequential set of questions is whether they are beginning to think about nuclear war fighting. Nuclear war fighting encompasses a spectrum from countervalue civilian targets and counterforce military targets, but the considerations go beyond destroying American cities for countervalue purposes or hitting major military targets for counterforce purposes. Nuclear war fighting also occurs at the operational or tactical level for specific military advantage. And in the Asia-Pacific region, the opportunity is ripe for the use of nuclear weapons apart from countervalue or counter force targeting—for example, by denying the use of terrain or in ways that conventional weaponry can't accomplish. We need to consider these possibilities as we focus on understanding the implications of the PRC's rapid nuclear modernization.

Conclusion

Roy Kamphausen's analysis suggests that China is well placed in the current global security environment. A protracted war in Ukraine keeps the United States and Europe distracted while giving the PLA what he calls "cost-free learning" about the future of warfare. The war in Iran has exposed American munition shortages, while China's strategic petroleum reserves have helped it weather the resulting oil shock. A more confident North Korea, meanwhile, complicates Xi Jinping's calculations but also benefits from the conflict.

However, Roy Kamphausen cautions against reading this as a sign that Beijing is poised to act on Taiwan. In his assessment, China is not ready to exploit current U.S. shortages, and the lesson it is drawing from Ukraine is more centered around Russian incompetence than the implications of the difficulties of war for PRC ambitions vis a vis Taiwan. He expects China's gray zone pressure to continue evolving instead, even as Beijing attempts to understand trends in the future of warfare emerging from Ukraine. He also warns that China's partnership is shallow: Beijing takes on no mutual obligations, shares technology only at a distance, and will not provide its most advanced capabilities to its partners. Finally, he urges policymakers to look beyond why China is expanding its nuclear arsenal and instead consider what its shift toward a medium-sized or even superpower-sized deterrent means for the region and the world. Whether the United States and Europe can respond with greater coordination, however, particularly on supply chain diversification, remains to be seen.