

INNOVATION AND CATASTROPHIC RISK, THE GEOPOLITICS OF TECHNOLOGY

Russia Didn't Start the Iran War. It Still Benefits from It.

Blog

April 24, 2026

Russia has emerged as one of the quiet winners of the 2026 war with Iran, turning the conflict into a modest but timely strategic opportunity, writes IST Senior Associate for Nuclear Policy Brandon Cortino.



Russia has not played a decisive role in the 2026 war with Iran. However, by extracting a set of modest but meaningful political and material gains, it is one of the biggest winners of the conflict. By positioning itself as a non-belligerent advocate of de-escalation, benefiting from tighter energy markets, and exploiting the diversion of Western attention and air-defense resources away from Ukraine, Moscow has turned a war it did not start into a limited strategic opportunity. These benefits are incremental and do not fundamentally alter Moscow's global position, but they do provide economic and political relief at a time when the strain of a four-year fight in Ukraine is becoming harder to ignore and the Russian economy's ability to sustain itself has been put under greater pressure.

The Timeline

Russia's initial response followed a clear pattern: rapid diplomatic outreach, repeated reassurances, and renewed references to a collective security framework for the Gulf in which Moscow positioned itself as a facilitator.

Shortly after the Israeli and U.S. strikes on February 28, 2026, Foreign Minister Sergei Lavrov held a call with Qatari Prime Minister and Minister of Foreign Affairs Mohammed bin Abdulrahman bin Jassim Al Thani about diplomatic reassurances and references to a [Gulf-based collective security architecture](#), an idea [dating back to the late 1990s](#). Moscow brought the idea [back up again](#) several days later, demonstrating that its February proposal was at least relatively serious. And by March 2, Putin had already held calls with leaders from [Bahrain](#), [Qatar](#), the [UAE](#), and [Saudi Arabia](#). Russia's speedy response reveals a broader diplomatic effort to maintain regional relevance. On March 3, [Lavrov spoke](#) with Oman's Foreign Minister about returning the conflict to the diplomatic track. On March 5, Lavrov expressed readiness to present a UN ceasefire resolution and a UN General Assembly initiative to [immediately end the conflict](#).

Russia's flurry of activity since the start of the conflict has been strategically designed to frame itself as a peacemaker that is simultaneously present, vocal, and nonviolent. Although these actions are unlikely to alter the course of the war, they present Russia as a practical non-belligerent providing solutions, and give the Kremlin a multitude of corollary benefits. Russia's objective in this behavior is not to supplant the United States, but to provide an additional choice in both trade and security that gives the Kremlin more leverage in international politics. In simpler terms, Russia approaches the Middle East like it does the Balkans: there is no grand plan for the region, but it is animated by its ambition to [rival the West](#).

The Benefits

Moscow derives multiple material and political benefits from its role in the Iran conflict, and its gains only stand to grow as the conflict between the U.S. and Iran continues. As a result of the Iran war, Russia has benefited from greater pressure on the energy market, the increased [need for Russian energy supplies](#), eased sanctions on Russian oil and natural gas, and renewed U.S. strategic attention on Iran at Ukraine's expense.

Material benefits

Rising oil and gas prices, selective sanctions flexibility, and renewed demand for supply stabilization all improve Russia's revenue outlook at a time of sustained fiscal pressure during its laborious fight in Ukraine.

Energy price increase and sanctions relief

Since the launch of Operation Epic Fury, [oil and natural gas prices have spiked sharply](#). Washington has now twice relaxed pressure on Russian oil in order to stabilize markets disrupted by the Iran war. First, the US Office of Foreign Assets Control (OFAC) signed a rule on March 5 [allowing India to buy Russian oil](#) for 30 days without suffering retaliatory sanctions. More recently, on April 17, the Trump administration renewed a waiver allowing countries to buy sanctioned Russian oil and petroleum products loaded on vessels [through May 16](#). This lightens energy pressures in the global economy and gives Russia a much-needed cash transfusion to the tune of almost [200 million barrels of oil](#) after the Russian National Wealth Fund was [cut in half](#) to fund continued fighting in Ukraine. U.S. policymakers have sent mixed messages on their approach towards Russia. U.S. Secretary of Energy Chris Wright said there is [no change in Russian sanctions policy](#), and that this is a temporary measure, but U.S. Secretary of the Treasury Scott Bessent has said further easing is still possible. Meanwhile, President Trump has said that it is possible to entirely [lift all oil sanctions](#) because there will be "so much peace." Romania and Bangladesh have also requested sanctions relief. The longer the war continues, the more attractive sanctions relief will look to other states facing higher energy costs and tighter supply.

Insurance and energy access

Shipping and insurance disruptions have created a second-order benefit for Moscow beyond increased energy prices, in the form of more Russian maritime insurance companies gaining traction. As traffic through the Strait of Hormuz slowed to a mere [five ships on Monday, April 20](#), in sharp contrast with the usual 120 ships. As a result, war-risk insurance premiums increased, in turn increasing the political and commercial cost of excluding Russian oil. India, for example, [expanded the number of Russian insurers](#) authorized to provide marine cover for ships entering Indian ports, as other insurance companies hesitate to do the same due to the rising risks. As pressure on the energy market increases, so too do energy prices, as well as tolerance for using Russian resources as a relief valve.

Redirection of Patriot battery ammunition from Ukraine

When it comes to the fight in Ukraine, one of the clearest battlefield implications is intensified competition for Patriot interceptors. Patriot missile batteries are among the United States' most advanced ground-based air and missile defense systems, designed to protect critical targets from aircraft, drones, cruise missiles, and some ballistic missiles. Because they are both scarce and highly capable, they are in high demand. Demand for Patriot batteries and interceptors has become a point of strain as the United States prioritizes its own forces and Gulf partners. The United States will continue to ensure its own operational safety, and attempt to reassure and protect regional allies when possible. Estimated interceptor usage already [exceeds 1,000 rounds](#), nearly double the [current annual production of 5-600](#). President Trump routinely [expresses skepticism](#) about continuing material support to Ukraine in order to accelerate a peace deal, forcing Ukraine to rely more heavily on alternative air-defense measures. This reliance on alternative measures only increases the likelihood that additional missiles and drones will get through Ukraine's air defenses, as Patriot missiles are ideally a part of a layered system to intercept faster moving targets such as missiles that Ukrainian drones struggle to intercept.

Political benefits

The war in Iran allows Moscow to present itself as a non-belligerent facilitator, enjoy intensified competition for Western resources, and shift attention away from Ukraine – all while allowing Russia to sit on the sidelines and do almost nothing.

Resource Competition

The political effect of Patriot interceptor scarcity extends well beyond Patriot batteries. Ukraine has successfully sustained Western media and political attention on its fight for four years, but this is the second time Western attention has shifted to the Middle East (the first time being the Hamas attacks on Israel on October 7, 2023). This conflict directly affects Western interests such as natural gas and oil, meaning resources and materiel that would otherwise go to Ukraine are now much more likely to be diverted to the Gulf. Even Ukrainian drone specialists have been directed to [aid in defending U.S. bases in Jordan](#), with ten other nations also asking for help. Ukraine is likely providing this support in the hope of preserving Western goodwill and securing additional assistance, but it still means fewer skilled defenders of the Ukrainian cities and critical infrastructure facing ever-increasing bombardments.

Russia's Diplomatic Position in the Middle East

Although the United States has long been the dominant outside power in the region, Russia has maintained a useful niche for itself without insisting that regional states choose between Washington and Moscow. The Kremlin now occupies an enviable position. It can talk to all parties despite allegedly providing targeting data to Iran; shape parts of the international agenda by being the first at the table to call for de-escalation; and exploit the reputational contrast created by renewed U.S. military action. Russia also benefits from the broader reputational and political fallout of renewed U.S. military action, including visible friction with NATO allies over the scope of Western involvement. That contrast gives the Kremlin room to present itself as the more restrained power. While the Gulf states are committed to maintaining their relationship with the United States, it is impossible for them to ignore the fact that a partnership [that was once a defensive shield is now a magnet for attacks](#). The Gulf will no doubt look for additional security assistance, especially as Patriot interceptors are harder to come by and the breadth of Iranian strikes on energy infrastructure widens. As they look elsewhere for additional security assistance, the Kremlin will be waiting with open arms.

Institutional Relevance Through the United Nations

By proposing UN-based mechanisms, Russia repositions itself inside the diplomatic machinery of crisis management. Even if its proposals go nowhere, Moscow still benefits from being viewed in the international community as a state trying to shape the diplomatic agenda rather than merely reacting to it, and its proposed collective security architecture has a more viable use case than ever before as Gulf states consider their own safety to a greater extent.

Strategic Flexibility

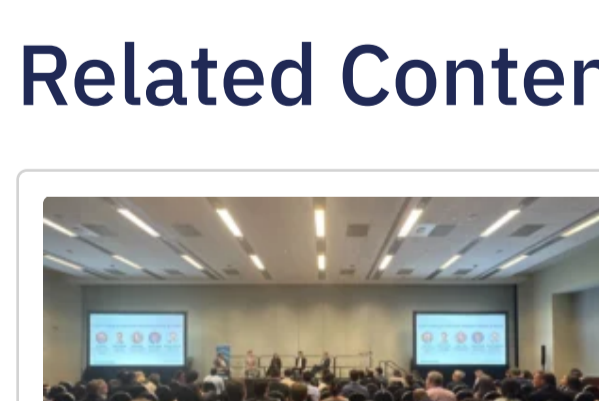
Given the stark contrast between Russia and the directly involved parties in the Iran war, Moscow enjoys rhetorical freedom and is less constrained, both diplomatically and operationally. Unlike the United States, Russia is not directly fighting in the Middle East. Unlike Iran, it is not absorbing strikes or worrying about targeting. Unlike Gulf monarchies, it is not trying to avoid being hit. The Kremlin can support Iran politically, reassure Gulf states diplomatically, undermine the United States' moral position, and still have space to maneuver with all parties.

Conclusion

Russia has not emerged from the 2026 Iran war as its decisive broker, nor has it fundamentally reshaped the balance of power in the Middle East. What it has done is more modest, but still meaningful: it has extracted a series of political and material benefits from a conflict driven by others. By remaining outside the fighting while presenting itself as a non-belligerent advocate of de-escalation, benefiting from tighter energy markets, and forcing Ukraine to compete harder for Western attention and air-defense resources, the Kremlin has turned the war into a limited strategic opportunity. These gains are incremental rather than transformative, but for a Russia still under pressure from a grinding four-year campaign in Ukraine, incremental relief is enough to matter.

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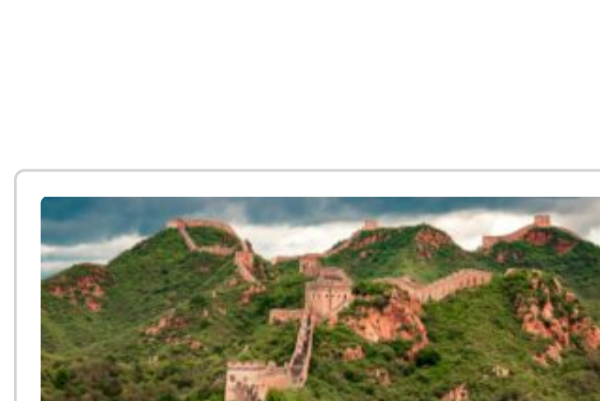


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How China Builds AI Power: IST Hosts Panel at the AI+ Expo

How is China building AI power, and what does the United States still misunderstand about the systems and actors driving it? At the AI+ Expo this month, hosted by the Special Competitive Studies Project (SCSP), IST convened a firestarter brief and panel with China experts to unpack one of the most consequential questions shaping technology and national security.

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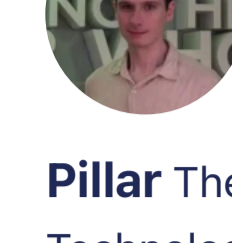


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Ahead of Beijing: Common Cause on AI's Biggest Risk

Later this week, Presidents Trump and Xi will sit down in Beijing. AI is on the agenda. Just two weeks ago, IST's Steven M. Kelly, AI Policy Network's Mark Beall, and IAPS' Karson Elmgren also traveled to China with a mission to discuss AI. In a recap blog, they emphasize the need for collaboration.

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Brandon Cortino

Pillar The Geopolitics of Technology

Topics

- Russia, Ukraine, energy, Iran, missile, missile defense, natural gas, strategic competition

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