



Russia's surrogate influence

Shaping power dynamics in the South
Caucasus after Nagorno-Karabakh war

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INTRODUCTION

During the Silk Road Forum in Tbilisi, Georgia, in October 2023, Armenia's Prime Minister Nikol Pashinyan proposed a "Crossroads of Peace" project.

This initiative, which crystallizes the Armenian government's pursuit of peace, envisions a multimodal transportation, communications and logistics network primarily linking Azerbaijan's mainland with its Nakhichevan exclave, and Russia with Turkiye¹.

The name of the project reflects Western optimism about a new era of peaceful, win-win cooperation and democratic stability in the South Caucasus, a vision concurrent with discussions about Russia's waning traditional influence.

However, a critical examination of the current regional dynamics suggests that the frequent invocation of "peace" by regional actors, amid the emergence of an autocratic, West-excluding regionalism in the Caucasus, might be obscuring the true nature of affairs and the evolving precariousness

of the geopolitics in the region.

Rather than reducing the influence of Moscow, the situation appears to be acquiring characteristics of Russia's collaborative dominance, in alignment with Turkey, Azerbaijan and Iran — a phenomenon we identify here as Moscow's "surrogate influence."

This report examines the current and potential political trajectories in the South Caucasus, through the lens of realpolitik, to consider the landscape in the aftermath of the Nagorno-Karabakh war and its implications for emerging regional trends, and to unravel the complex interplay of interests and misconceptions about potential peace initiatives.

While addressing the West's excessive optimism regarding positive dynamics in the region, we seek to identify the factors impeding genuine opportunities for peace. It also questions how realistic the West is being in envisaging democratic stability, given the persisting imbalances of power and an evolving architecture of cooperative, autocratic hegemony² in the region, jointly imposed by Russia, Turkiye, Azerbaijan and Iran at Armenia's expense.



Armenia has been dealt a significant nationwide blow



WESTERN OPTIMISM IN MINDS VERSUS PESSIMISM ON THE GROUND

The assault by Azerbaijan on the Armenian-populated polity of Nagorno-Karabakh in September 2023, coupled with the conspicuous lack of intervention by Russia's "peacekeeper" forces stationed in the area, led to civilian casualties and the forced ethnic displacement of the indigenous population.

The politico-military contestation of Nagorno-Karabakh, the political status of which has been disputed by Yerevan and Baku since the early 1990s, culminated in major, substantial alterations in political configurations that markedly reshaped the region's ethno-political landscape in favor of Azerbaijan³. This shift has drawn Western attention to the regional reliance on military power, the intimidating use of force and coercive diplomacy, with profound implications.

Aside from grappling with a major influx of ethnically cleansed Armenians — initially about 30,000 as a result of the 2020 war⁴, and more than 100,000 following Azerbaijan's takeover of the remainder of Nagorno-Karabakh in September this

On the first day of Azerbaijan's renewed offensive on the Nagorno-Karabakh region in Sep. 2023, the Karabakh authorities claimed 25 people were killed. AFP

year — Armenia has been dealt a significant nationwide blow⁵.

The loss of Nagorno-Karabakh has led, beyond the deep emotional and ideational toll, to real, material repercussions for the country. These include a critical shortage of water resources⁶, compromised food security⁷, and diminished hydroelectricity production⁸. These issues are further aggravated by significant security vulnerabilities along Armenia's re-established, disadvantaged post-Soviet boundaries.

The situation is compounded by repeated Azerbaijani military incursions into Armenian sovereign territory between 2021 and 2023. Notably, a major assault in September 2022 targeted Armenia's most vulnerable southern provinces, Vayots Dzor and Syunik⁹. These incursions have resulted in the occupation of more than 200 square kilometers of Armenian territory, leaving vital economic lifelines in the provinces exposed.

Despite international appeals by the European Parliament, the US and France, Azerbaijani authorities persist in their refusal to withdraw troops from Armenian territory. Furthermore, President Ilham Aliyev's



and we continue to urge peace” between Armenia and Azerbaijan¹².

The benefits of this approach, from a US perspective, were emphasised when the hearings highlighted “the opening up of routes, economies and energy cooperation in the region as a key dividend of peace, which enables wins for the states away from the Russian orbit¹³.”

Similarly, Charles Michel, the president of the European Council, optimistically said the EU’s “aim is to help Armenia and Azerbaijan reach a comprehensive and fair peace, ... we are determined to play a role to support a stable, (secured, democratic) and prosperous Caucasus¹⁴.”

This perspective, however, might overlook the intricate dynamics at play; notably the strengthening of strategic coordination, and the growing trend of geopolitical alignment, among Russia, Azerbaijan, Turkiye and, to some extent, Iran, against the backdrop of immense power disparity between Azerbaijan and Armenia.

Moreover, Azerbaijan’s strong anti-Armenian political posture, underpinned by the “revenge politics” cultivated by President Aliyev for two decades, profoundly entrenches Azerbaijan’s zero-sum approach toward Armenia and makes the situation unpredictable.

From Azerbaijan’s viewpoint, as expressed by Aliyev, “Armenia is a country that has suffered defeat, signed a capitulation in November (2020), a country that has fallen on its knees before us, a country with a bowed head, and it will always be the like that¹⁵.”

In the context of his continued warmongering against Armenia, the Azerbaijani leader said that the people of the country should always remember their experience of the Azerbaijani “iron fist” that “crushed their heads,” so that “one day Armenians will wake to see the Azerbaijani flag above their heads¹⁶.”

During a military parade in November 2023 in the ethnically cleansed city of Stepanakert, the now-empty capital of Nagorno-Karabakh, Aliyev said the forced unilateral concessions by the Armenian government were “part of the act of capitulation signed by Armenia,” insisted that the country “should comply with our (Azerbaijani) demands,” and emphasized that “we dictate the situation here¹⁷.”

As stated by Aliyev, Azerbaijan’s long-pursued strategy of isolating Armenia politically and economically continues to have a significant impact, even as an Armenia-Turkiye normalization process unfolds¹⁸. This process remains heavily influenced by Baku’s willingness, or lack thereof, to facilitate Armenia’s emergence from the nearly three-decade-long economic blockade imposed by Turkiye in solidarity with Azerbaijan.

administration is demanding additional territorial concessions from Armenia in the northeastern province of Tavush¹⁰.

If Armenia concedes, this will not only diminish its overall economic vitality but potentially place the main road connecting Armenia with Georgia under Azerbaijani control, mirroring the current situation with the main Armenia-Iran highway in Syunik, which is already under Azerbaijani administration.

Notwithstanding the tragic consequences of recent events for Armenia, and the unfolding refugee crisis, Western policymakers and institutions perceive the prospect of an Armenia-Azerbaijan peace deal as an opportunity to reduce Russia’s influence and enhance the Western presence in the Caucasus.

From an optimistic Western viewpoint, a peace agreement, in the form of a framework based on liberal and cooperative values, could signal a significant reorganization of regional power structures, helping to foster democratic peace and sustainable progress.

Some posit that the recent violent end to the conflict, though painful, might eventually benefit Armenia by placing it at the center of a peaceful nexus. As the US State Department has said, a “durable and dignified peace ... is achievable in the South Caucasus,” creating an opportunity for the region to reap the economic benefits from a peace deal¹¹.

During congressional hearings titled “The Future of Nagorno-Karabakh,” James O’Brien, the assistant secretary of state for European and Eurasian affairs, said: “We are pursuing the peace agreement, we are deeply engaged

EU chief Charles Michel made an unannounced visit to the Ukrainian capital Kyiv on Nov. 21, 2023, the tenth anniversary of the start of the pro-European Maidan protest movement. AFP



Azerbaijan insists on the development of a 'Zangezur corridor'

With limited ability to project power or deterrence, the government in Yerevan finds itself compelled regularly to make unilateral concessions to Baku, to the detriment of its own national interests. Prime Minister Pashinyan in his approach consistently appears to exhibit appeasement, deviating little from the “peace” agenda his country is trapped within, except occasionally to lament Baku’s frequent references to Armenia as “Western Azerbaijan¹⁹.”

Yerevan’s “Crossroads of Peace” is yet another attempt at appeasement, which has already been firmly rejected by Baku as “utopia²⁰.” Instead, Azerbaijan insists on the development of a “Zangezur corridor,” an extraterritorial passage through Armenia’s vulnerable southern province of Syunik, connecting Azerbaijan with its exclave of Nakhchivan, controlled by Russia’s Federal Security Service with limited Armenian involvement. This is something Pashinyan’s government was forced to commit to in a trilateral statement with Aliyev and Russian President Vladimir Putin in November 2020²¹.

In the regional arena, the Aliyev regime’s self-perception of Azerbaijan being the absolute victor, coupled with the use of intimidating and derogatory rhetoric about Armenia, has bolstered its ambitions to solidify Azerbaijan’s new sub-hegemonic middle-power status in the region.

As the Azeri leader regularly states: “Henceforth, no political, economic, infrastructure, energy initiative or strategic project is possible without the participation of Azerbaijan, nor without our consent or consideration of our interests²².”

Therefore, the new situation not only enables the Aliyev government to weaponize the power asymmetries between Armenia and Azerbaijan, further entrenching the former’s subjugated position in relation to the latter, but also capitalizes on the profound geographic advantage gained as a result of the 2020 war.

Essentially, this forceful pacification, at the expense of Armenia’s rights and interests, is not a choice made freely by Yerevan. The situation further complicates the already intricate reality, rendering the prospects for long-term regional stability increasingly bleak.

Importantly, however, Azerbaijan’s new regional posture involves a delicate balance that requires accommodating the interests of Turkiye and Russia while countering Western influence, and investing in the strategic alliance between the regimes of Turkish President Recep Tayyip Erdogan and his Russian counterpart, Putin.

Through continued arms acquisitions and economic autocracy, paired with various other contributing factors, Azerbaijan is

gradually altering its image. From previously positing itself as a seeker of justice and peace, the country is increasingly seen as an authoritarian sub-hegemon with expansionist traits and implicit intentions of regional ascendancy over its two peers, Armenia and Georgia, while relying on its expanding strategic bonds with Russia, Turkiye and Iran.

The factors outlined above reduce the likelihood of achieving the “durable and dignified peace” that Western stakeholders hope for. Given Azerbaijan’s new pattern of behavior, which is likely to be bolstered by its renewed non-Western regional alignments, the prospect of such a peace seems more bleak than genuinely achievable.

RUSSIA’S REGIONAL INFLUENCE: DIMINISHING OR CONSOLIDATING?

There has long been an assumption that Russia, as a status quo power, seeks always to instrumentalize frozen conflicts in the post-Soviet space for its own geopolitical advantage. Traditionally, this strategy was believed to involve ensuring these conflicts remain unresolved to help maintain dominance in strategic peripheries.

However, Moscow’s “active inaction” in failing to prevent the full-fledged war in Nagorno-Karabakh in 2020, as a prelude to its own plans for the invasion of Ukraine in 2022, and an intensive use of hybrid tactics indicate significant deviation from this widely accepted belief.

From Russia’s viewpoint, unique approaches to conflict “resolution,” such as the one in Nagorno-Karabakh, became more geopolitically contextual. By not opposing Azerbaijan’s efforts to alter the political and territorial status quo — which had remained largely unchanged since the Russia-brokered ceasefire between Armenia, Nagorno-Karabakh and Azerbaijan in 1994 — Moscow, starting from 2008 (Georgia), 2014 (Crimea), 2015 (Syria and Donbass) to 2020 (Nagorno-Karabakh), saw the rekindled conflict as an opportunity.

Russia sought to supplant the institutional West and key Western stakeholders in conflict-resolution processes, and imposed “solution models” that reinforced Russia’s regional presence by legitimizing the use of force and thus ridiculing the Western values-based system and democratic norms.

In other words, the Kremlin’s eagerness to quickly normalize relations between its two close allies, Armenia and Azerbaijan, was seen as a recipe for curtailing Western influence and involvement in regional affairs.

Likewise, some observers are of the opinion that Russia is weakened and therefore neglecting the Caucasus region as a result of its military debacle in Ukraine, additionally

referring to Armenia's activated ties with the West, specifically the US and France.

However, contrary to the expectations of some, the dramatic shift in the decades-long status quo of the Nagorno-Karabakh conflict did not diminish the dominance over the region Russia has historically pursued. Instead, the Kremlin transformed its Caucasus strategy from noncooperative dominance to cooperative dominance, by sharing influence with Turkiye, Iran and Azerbaijan to keep the West from influencing regional developments.

The outcome of shared interests of the regional actors evoked 3+3 format with the agenda of integrative regionalism at the core, clearly manifesting opposition to the West in civilizational and geopolitical terms while challenging its values and norms systems in the regional context.

Meanwhile, the shift in the Kremlin's strategy in the Caucasus bolsters Russia's economic and military footprint in both Armenia and Azerbaijan. By having Turkiye and Iran as collaborative architects in a redesign of the Caucasus landscape, with little Western influence and presence, Moscow has expanded its leverage with new regional engagements.

This includes a recalibration of its strategic alliances with two of the three Caucasus states (Armenia and Azerbaijan) while maintaining a significant military presence in Georgia (Abkhazia and South Ossetia), Azerbaijan (Nagorno-Karabakh) and Armenia.

This strategy, involving the effective interplay of three regional powers in a collaborative stance against Western influence, and inroads made by Moscow in reinforcing its footprint in Armenia and Azerbaijan and its hybrid projection of power over Georgia, constitutes the Kremlin's modified approaches in the region that we conceptualize as "surrogate influence."

Specifically, while Russia had "peacekeeping" troops stationed in Nagorno-Karabakh, its strategic rapprochement with Azerbaijan gained the status of "allied interactions" in early 2022, which facilitated Moscow's desire to enhance its investment in the nation's transport logistics, as well as its hydrocarbon industry and infrastructure²³.

Notably, Russia's Lukoil energy corporation, which is currently under US sanctions, acquired a \$1.45 billion stake in Azerbaijan's Shah Deniz gas field and associated pipeline projects. This increased Lukoil's total stake to 19.99 percent, making it the second-largest stakeholder after BP, the primary operator²⁴.

This deal was finalized on Feb. 18, 2022, about a week before Russia's invasion of Ukraine. As part of the agreement, Lukoil provided a \$1.5 billion loan to Azerbaijan's state oil company, SOCAR, to enable the

processing of Russian crude oil at SOCAR's refinery in Turkiye²⁵.

In a related development, Russia's state-owned Gazprom signed a deal with SOCAR in November 2022 to increase gas exports by delivering up to 1 billion cubic meters of natural gas to Azerbaijan by March 2023²⁶.

In the oil sector, it was reported that in late October this year, the economy ministers of Russia and Azerbaijan had agreed to boost the reverse flow of Russian oil, affected by Western sanctions, through the Tikhoretsk-Baku pipeline, adding that "our task is to consolidate our efforts" in working with the international markets²⁷.

The deals that have contributed to the integration of Azerbaijan's energy infrastructure with that of Russia raise questions about the former's ability, and intent, to help the Kremlin bypass Western sanctions by allowing Russian hydrocarbons to reach Europe's energy distribution network via Turkiye and Azerbaijan.

In the Aliyev regime, Russia has found a close ally with which to work to redefine regional integration rules and collaboratively establish, alongside other pivotal partners such as Turkiye and Iran, a regional order in which the West is sidelined and ineffective.

In recent months, Russia has notably increased its involvement in Azerbaijan's transit and logistics sector. Moscow has pledged a major investment of €1.3 billion (\$1.4 billion) to enhance Azerbaijan's railroad logistics as part of its North-South transport corridor project, which aims to connect Russia with Iran via Azerbaijan²⁸.

Credible sources within Russia's Ministry of Foreign Affairs have indicated that Azerbaijani and Russian rail operators, both of which are fully state-owned companies, have opened negotiations and demonstrated keen interest in expanding their regional collaboration.

Given that Armenia's railway system is entirely owned by South Caucasus Railway, a company fully owned by Russian Railways, this burgeoning collaboration between Russian and Azerbaijani railway operators, particularly in the context of the Armenian government's "Crossroads of Peace" initiative, potentially opens the door for a joint Russia-Azerbaijan utilization of Russian-controlled Armenian railway routes, especially those that Azerbaijan wants to be part of the previously mentioned "Zangezur corridor."

This cooperation could strategically serve Russia and Azerbaijan's shared interest in establishing a sustainable, strategic, logistical connection between Russia, Azerbaijan and Turkiye that bypasses Georgia, which is still predominantly West-oriented.

Against this backdrop, since 2021 Moscow has bolstered the presence of its military



The Kremlin transformed its Caucasus strategy from non-cooperative dominance to cooperative dominance



and security services along the post-2020 line of contact between Armenian and Azerbaijani forces, and carried out significant deployments in Armenian provinces bordering Azerbaijan.

In November 2020, Russian military personnel were stationed, at the request of the Armenian government, along Armenia's Soviet-era borders to control the advance of the Azerbaijani military during the closing days of the war²⁹.

Based on stipulations set out in the "Agreement About the Status of the Border Guards of the Russian Federation in the Republic of Armenia," signed in September 1992, and in the 2010 "Protocol N5 On Prolongation of the Presence of the Russian 102nd Military Base in the Republic of Armenia," in May 2021 and September 2022 the Pashinyan government authorized the allocation of land to Russia in the provinces of Syunik, Gegharkuniq and Vayotz Dzor³⁰.

This was done to allow Moscow to develop new security outposts manned by various Russian forces, including border guards managed by Russia's Federal Security Service, also known as the FSB. While concentrated primarily in two strategic zones — along the border between Iran and

Azeri forces seized arsenal from ethnic Armenian separatist fighters, who surrendered their weapons under a Russian-mediated agreement in Sep. 2023. AFP

Armenia, and in the borderlands between Armenia and Azerbaijan — it has resulted in approximately 2,000 additional Russian personnel being stationed in Armenia's southern provinces in the past two years, in addition to more-traditional deployments in Gyumri, Armenia's second-largest city, and at Erebuni airbase near Yerevan, the capital.

By relying on the tangible presence of the FSB along the Armenia-Iran border and establishing strategic control over the Meghri railway in Armenia's Syunik province — the plan for which is to connect Azerbaijan with Nakhichevan and, more broadly, Russia with Turkiye (especially as the Nakhichevan-Kars railway is under construction) — Moscow is simultaneously bolstering the presence of its intelligence services in southern Armenia. These intelligence services are believed to operate under the guise of diplomatic or cultural representations, sanctioned by the Pashinyan government.

A Russian cultural centre has already been established in the southern Armenian town of Kapan, and Yerevan and Moscow have agreed to open a Russian consulate there, with a staff of between 30 and 40³¹. This takes place against the backdrop not only of



Armenian exports to Russia have increased over the past 24 months



Moscow's substantial increase in its services in areas along the border between Armenia and Iran, and its involvement in the logistics for creating a connection between Azerbaijan and Nakhchivan, but also in key logistics in Syunik province in general. These include the stationing at Kapan airport and the deployment of the Russian Air Force at Sisian airport since 2021³².

The near-complete takeover of strategic sites and infrastructure in Syunik by Russia has progressively eroded Armenia's sovereign control over the province. The Russian security forces operate autonomously, without any oversight by the Armenian government, and routinely deny EU monitors access to areas along the border between Armenia and Azerbaijan.

Prior to the 2020 war in Nagorno-Karabakh, Armenia maintained full control of its line of contact with Azerbaijan, relying on geographically viable boundaries, and Russian forces were deployed only along its borders with Turkiye and Iran. However, the defeat in 2020, followed by regular hostilities since then, has led to the widespread presence of Russian forces throughout Armenian territory.

This development compounds Armenia's

Renewed fighting between Armenia and Azerbaijan on Sep. 19, 2023, forced over 100,000 Armenians to flee the contested Nagorno-Karabakh enclave. AFP

longstanding dependency on Russia in almost all vital sectors, including infrastructure, the economy, trade, energy (gas, oil and nuclear), telecommunications, and banking, not to mention the full institutional integration of Armenia into Russian-dominated organizations such as the Collective Security Treaty Organization, the Commonwealth of Independent States, and the Eurasian Economic Union.

In addition, Armenian exports to Russia have increased over the past 24 months and now account for more than 40 percent of the country's total exports³³. This highlights Yerevan's considerable reliance on Russian imports of essential goods, especially in light of Armenia's sudden shift in imports from the EU and increased exports to Russia following the start of the war in Ukraine.

Furthermore, in addition to Russia's monopoly on Armenia's strategic logistics, Gazprom Armenia, a subsidiary of the Russian state gas company, owns the entire gas-distribution network in the country and holds a monopoly on the importation of gas and petroleum products.

Taking this into account, the observers' pointing the Armenian government's



On Sep. 28, 2023, Azerbaijan said it wanted ethnic Armenians to remain in Nagorno-Karabakh after its offensive crushed the region's independence bid. AFP

ongoing overtures with the West as indicator of Russia's decreasing influence and Armenia's shift away from Russia's orbit rises an impression that perhaps, Pashinyan's government is primarily manoeuvring within the boundaries set by Putin's administration. This is proved by the Armenian government's discourse suggesting that this is actually Moscow's decision to distance itself from Armenia, rather than a deliberate choice by Yerevan.

CONCLUSION

The significant reduction in Armenia's territory and resources, as well as the displacement of more than 130,000 native Armenians, has left its sovereign borders highly vulnerable, exposing the country to potential Azerbaijani aggression and coercion.

Despite international appeals, Azerbaijani troops remain in Armenian territory, where they dominate the country's exposed southern provinces and strategic communications. This reality makes Armenia even more dependent on Russia, but also on Azerbaijan.

The strategic loss of Nagorno-Karabakh has not only increased Armenia's vulnerability

but also fueled the expansionist vision of Azerbaijan. Emboldened by its ability to influence the regional agenda, Azerbaijan through its actions threatens to solidify a power imbalance and establish a new hierarchical regional order.

This situation not only threatens the autonomy and sovereignty of Armenia but also sows the seeds of future instability and conflict in the South Caucasus, with Armenia caught in a web of dependencies and vulnerabilities.

This report therefore suggests that the discourse about a lasting and dignified peace in the region is little more than a facade or buzzwords that divert attention from underlying conditions conducive to renewed hostilities.

This dynamic erodes Armenian sovereignty and national interests, and seeks to curtail Western norms and policy influences in the region, thereby amplifying regional uncertainties and non-Western (in)stability.

In other words, Russia's recalibrated "surrogate influence," applied through allies Azerbaijan, Türkiye and Iran, leaves little room for optimism that a regional happy ending might be imminent.

FOOTNOTES

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