

Introduction

Recent geopolitical events reflect a profound shift in the balance of power in the Caucasus and Central Asia, where Russia is seeing its historical influence eroded while Azerbaijan is consolidating its position as a key player with the strategic backing of Turkey. This process is manifesting itself on several simultaneous fronts that are redefining regional dynamics.

The rapprochement between Azerbaijan and Turkmenistan marks a turning point in the region's energy landscape. Recent agreements between the two countries, separated by the Caspian Sea, suggest a strengthening of ties that could reconfigure hydrocarbon flows. For Turkmenistan, traditionally isolated and dependent on Russia and China, this opening towards Azerbaijan represents an opportunity to diversify its export routes. For Baku, it means consolidating its role as an energy bridge to Europe, just as the continent seeks alternatives to Russian supplies. This realignment clearly hurts Moscow, as it weakens its North-South energy corridor project and reduces its influence over Ashgabat.

At the same time, there is relative calm in relations between Armenia and Azerbaijan, a notable change after decades of conflict. Recent meetings between the leaders of both countries have been unusually cordial, largely motivated by Azerbaijan's interest in developing the Zangezur corridor. This route, which would pass through Armenian territory, would directly connect Azerbaijan with its enclave of Nakhchivan and, by extension, with Turkey, offering a more efficient route to European markets. Although underlying tensions persist, this project could become a rare opportunity for cooperation between traditionally hostile neighbours such as Armenia on one side and Azerbaijan and Turkey on the other.

However, this regional outlook contrasts with the marked deterioration in direct relations between Russia and Azerbaijan. Recent diplomatic incidents have exposed a growing strategic rivalry. The relationship, once characterised by a degree of pragmatic cooperation, has become increasingly cold and calculating.

This tension reflects not only immediate geopolitical differences, but also a deeper competition for influence in the Caucasus and Central Asia, where Azerbaijan, strengthened by its victory in Nagorno-Karabakh and its alliances with Turkey and Israel, no longer accepts the role of junior partner that Moscow had hoped it would maintain.

This complex web of interests and realignments suggests that we are witnessing a structural transformation of the region, where traditional Russian dominance is giving way to a more open scenario in which the Azerbaijani regime is consolidating its power and leadership. Azerbaijan emerges as the clear beneficiary of this process, while Russia faces the challenge of adapting to a reality where its ability to dictate the terms of regional politics is increasingly being questioned.

The Azerbaijan-Turkmenistan summit

The traditional secrecy of Turkmenistan, a Central Asian country known for its opacity and rigorous neutrality, is showing signs of a notable shift in its foreign policy. What was once presented as ‘positive neutrality’ seems to be evolving into what we might call ‘diversified openness,’ particularly visible since the generational change in 2022 that brought Serdar Berdimuhamedow, son of the previous leader, to the presidency of the country¹.

This change of course has materialised in a notable increase in bilateral contacts with Azerbaijan, where summits between the two states have taken place with unusual frequency. These meetings, framed within the cooperation between Caspian neighbours, respond to shared strategic interests that transcend mere diplomatic rhetoric.

The Azerbaijani-Turkmen paradox: competitors and necessary partners

From an energy perspective, there is a curious paradox: although Azerbaijan and Turkmenistan are competitors as hydrocarbon producers, Ashgabat desperately needs Baku to access European markets. Azerbaijan has thus become the main channel for Turkmen exports to the West, consolidating the so-called ‘Middle Corridor’ or TITR (Trans-Caspian International Transport Route) that connects China with Europe via Central Asia and the Caucasus.

¹ CUTLER, Robert M. “Turkmenistan's Strategic Reentry into the Gas Diplomacy”. The Times of Central Asia, 30/07/2025. <https://timesca.com/turkmenistans-strategic-reentry-into-gas-diplomacy/>



Image 1: Map of the main connections in the Caspian-Caucasus region. Source: <https://www.newsilkroaddiscovery.com/usaid-full-potential-of-trans-caspian-international-transport-route-yet-to-be-achieved/>

This dynamic represents a major setback for Russian interests in the region. Moscow, which counted on Turkmenistan as a key piece in its North-South corridor project, is seeing its influence gradually eroded. Turkmenistan's diversification not only weakens Russia's position as the dominant energy supplier in Europe, but also symbolises a deeper change: the former Soviet republics of Central Asia are finding alternatives to their traditional dependence on Moscow. However, there is a considerable gap between diversification ambitions and their effective implementation.

Today, Russia and China remain the main recipients of Turkmen gas², and existing infrastructure, long-term agreements and geographical realities impose limits on this strategic reorientation. The real test for this new Turkmen foreign policy will come when agreements with Azerbaijan must be translated into concrete energy flows to Europe. Only then will it be possible to assess whether this ‘diversified openness’ represents a structural change or simply a tactical readjustment in the complex energy geopolitics of the region.

Meanwhile, Russia is forced to watch with growing concern as its traditional sphere of influence fragments, in a process where generational changes in regional leadership and the reconfiguration of energy routes are redrawing the geopolitical map of Eurasia.

The Middle Corridor: a strategic axis born of geopolitical convergence

The emergence of the Middle Corridor as a key route for Eurasian connectivity is not a matter of chance, but rather the result of two historical dynamics that have converged at precisely the right moment. On the one hand, we find the ambitious Belt and Road Initiative (BRI) promoted by China, whose Central Asian arm sought precisely to create an infrastructure network linking the Asian giant with Europe through the former Soviet republics. This megaproject, initially conceived as an alternative to the Western-dominated maritime routes, found its natural link in Central Asia.

However, it was the outbreak of conflict in Ukraine in 2022 that definitively catapulted the strategic importance of this corridor. Western sanctions against Russia not only altered the continental energy map, but also fractured Moscow's monopoly over land trade routes to Europe. Suddenly, what had been a theoretical alternative became a practical necessity: the Middle Corridor offered the countries of the region – and their European partners – a way out of their dependence on Russian infrastructure.

The current geopolitical context is particularly conducive to the development of these routes through Central Asia and the Caucasus, strengthening pan-Turkic movements and revitalising alliances between countries that share ethnic origins, cultural traditions and,

² BERNAD-PEARL, Joshua. “Bridging the Caspian: Turkmenistan's Foreign Minister Meets With Azerbaijan's President Aliyev”. Caspian Policy Center, 07/11/2025. <https://www.caspianpolicy.org/research/turkmenistan/bridging-the-caspian-turkmenistans-foreign-minister-meets-with-azerbajjans-president-aliyev>

increasingly, common strategic interests.

Turkey, as the main champion of this Turkic identity, has been able to capitalise on this resurgence, weaving a network of economic and political cooperation that challenges traditional Russian hegemony in the region.

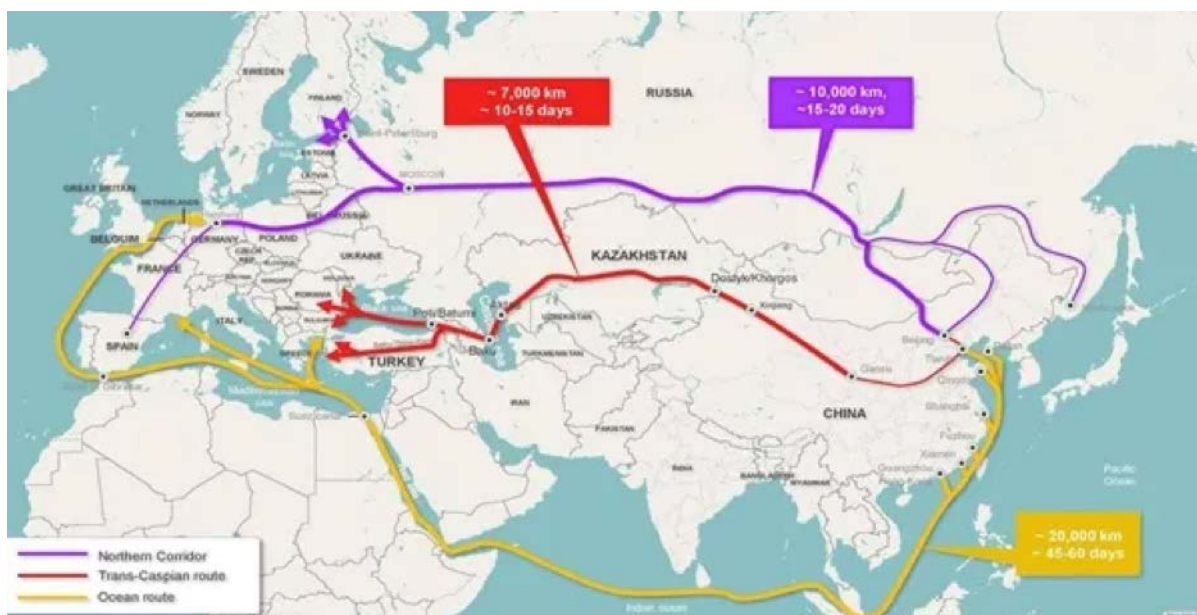


Image 2: Comparison of different routes to Europe. Source:

<https://bakuresearchinstitute.org/en/the-trans-caspian-corridor-the-shortest-path-or-a-difficult-bridge-between-east-and-west-2/>

Kazakh saturation and the search for alternatives

The very success of the corridor has created new logistical challenges. The main route, which crosses Kazakhstan to reach the Caspian Sea via its northern coast towards Baku, is showing clear signs of saturation. This congestion has prompted a search for secondary routes to distribute the growing trade flow. This is where the potential of Turkmenistan and its Caspian coastline comes into play, as it could offer a complementary alternative route (Image 3).

This diversification of routes responds to an unstoppable geo-economic logic: as Europe accelerates its energy and trade decoupling from Russia, corridors that avoid Russian territory gain strategic value. The Caspian has thus become a veritable ‘logistical lake’,

where connections between Azerbaijan, Kazakhstan and Turkmenistan take

on unprecedented importance.



Image 3: Map of the Middle Corridor in the vicinity of Europe. Source:

<https://en.azvision.az/news/177736/from-china-to-europe-%C2%A0how-middle-corridor-redefines-global-trade-routes.html>.

A new map of influences

What began as a Chinese connectivity project is transforming into a complex web of interests where multiple actors—from Turkey to the EU—seek to secure their position. Russia, for its part, is watching its traditional dominance over Eurasian land routes gradually erode, while China sees its BRI initiative take on dimensions that transcend its original plans.

The future development of the Middle Corridor will depend on the ability to resolve its current bottlenecks and the evolution of the Ukrainian conflict. But one thing seems clear: it is here to stay, redefining the balance of power in a region that for centuries was the

exclusive domain of Moscow and is now becoming an arena of competition between multiple powers.

Russia's dilemma and the search for new energy alternatives

Recent international sanctions against Iran, imposed in the context of its escalation with Israel, combined with the opening of the Turkmen market, have significantly impacted Russia's energy plans. The Russians had considered Iran a strategic route to circumvent Western restrictions and export their energy resources to global markets. However, the tightening of the economic siege on Tehran has forced Moscow to urgently seek viable alternatives to ensure the export of its supplies in the event that the crisis in the Middle East continues.

In this scenario, Russia has begun to explore a controversial but potentially useful option: rapprochement with the Taliban regime in Afghanistan³. This strategy would not only respond to the immediate need to find new trade routes, but also contemplates access to Afghanistan's vast mineral resources, which are still largely untapped. The move represents a significant shift in Russian foreign policy, which had traditionally maintained a cautious stance towards the Taliban.

This change in stance highlights Moscow's growing desperation to overcome economic isolation and maintain its energy export capacity. However, the commitment to Afghanistan carries significant risks: from the country's internal instability to the possible diplomatic repercussions of legitimising the Taliban government. The final decision will depend on how long the Iranian crisis lasts and Russia's ability to negotiate favourable terms with a regime known for its unpredictability.

Meanwhile, the situation continues to demonstrate how conflicts in the Middle East can alter geopolitical calculations in seemingly distant regions, forcing powers such as Russia to reconsider their alliances and strategies in record time.

³ DRURY, Flora y WILSON, Tabby, "Russia becomes first state to recognise Afghanistan's Taliban government". BBC, 04/07/2025. <https://www.bbc.com/news/articles/c78n4wely9do>

The Zangezur corridor

Interestingly, President Ilham Aliyev could not have chosen a more symbolically charged setting for his meetings with Turkmen delegates than the city of Khankendi (formerly Stepanakert), the former capital of the defunct Republic of Artsakh. This gesture, which reinforces Azerbaijan's narrative of sovereignty over the territory, contrasts with the delicate geopolitical reality facing Baku: in order to realise its long-awaited land corridor to Turkey, thereby avoiding the Georgian route, Azerbaijan ironically depends on Armenia's cooperation.

The project, which would connect the Azerbaijani region of Nakhchivan with the main territory through Armenian soil, the so-called 'Zangezur Corridor' (Image 4), promises economic and strategic benefits for both sides, but also arouses deep mistrust in Yerevan. Armenia, with justified caution, fears that this move could become a covert violation of its sovereignty, replicating the pressure tactics that Baku has employed in the past. However, if clear diplomatic safeguards are guaranteed – such as respect for Armenian jurisdiction over the corridor and international oversight mechanisms – the initiative could become a historic opportunity.

Winners, losers and difficulties

For Armenia, the corridor would represent a significant economic boost: not only would it generate revenue from transit and logistics services, but it would also revitalise its strategic southern region, which borders Iran. In addition, Yerevan would gain some leverage in negotiations on other thorny issues, such as the status of Armenian enclaves still under Azerbaijani control. Azerbaijan, for its part, would consolidate its territorial integration – by connecting with Nakhchivan without intermediaries – and save on the costly tolls it currently pays to Georgia. Turkey, Baku's main ally, would see its role as an energy and trade hub between Asia and Europe strengthened.

However, the plan has clear losers. Iran, whose economy is already suffering from Western sanctions, would lose relevance as an alternative route for regional trade. Tbilisi, for its part, would see a decline in the revenue it currently obtains from the transit of Azerbaijani goods, a blow to Georgia at a time of internal political fragility. It is no coincidence that the EU supports the project: a direct route for Azerbaijani gas would

reduce prices and increase alternatives to Russian supplies.



Image 4: **The Zangezur corridor.** Source:

<https://www.cenae.org/por-que-ira-acuten-apoya-a-armenia-contra-azerbaiya-acuten.html>

The biggest obstacle is not logistical, but political. Armenia demands guarantees that the corridor will not be militarised or used to demand future territorial concessions. Baku, meanwhile, insists that the project must operate under its control, a circumstance that would jeopardise

Yerevan's territorial unity. In this context of tension, the United States has emerged as a possible mediator, proposing a management model reminiscent of the historic Panama Canal agreement: a 100-year lease that would give Washington a share in the economic benefits of the corridor⁴. This formula, which combines operational security with economic incentives, could be attractive to Azerbaijan, whose close ties with Israel facilitate its alignment with US interests.

⁴ U.S. Department of State, "Strengthening U.S. "Türkiye Relations and Advancing Relations with Syria", FPC Briefing 2025, <https://www.state.gov/briefings-foreign-press-centers/strengthening-us-turkiye-relations-and-advancing-relations-with-syria>.

However, Armenia views this option with suspicion and would probably prefer the European Union (France) as a neutral guarantor, seeking to balance the influence of the various powers in the region.

The dispute over the corridor's management model reflects in miniature the complex geopolitics of the Caucasus, where seemingly technical infrastructure projects become battlegrounds for influence between global and regional powers. The solution, if it comes, will likely require painful concessions on both sides and a delicate balance between the interests of the external actors involved.

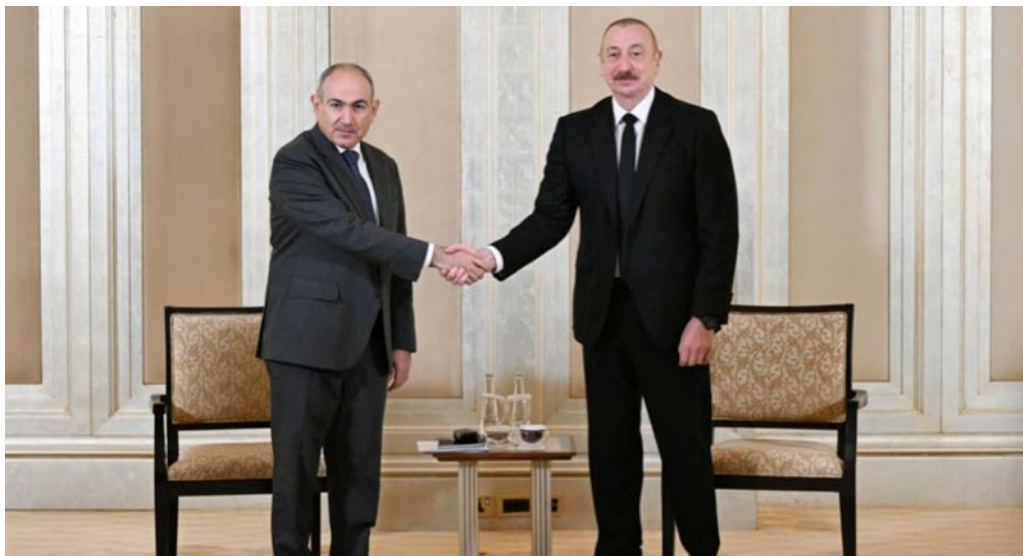


Image 5: One of the latest meetings between the Armenian and Azerbaijani leaders took place on 10 July in Abu Dhabi. Source: <https://www.aa.com.tr/es/mundo/la-reuni%C3%B3n-entre-aliyev-y-pashinyan-en-abu-dabi-transcurre-en-un-ambiente-constructivo/3627394#>

Tension in Putin-Aliyev relations

Azerbaijan's extraordinary strengthening in recent years is completely redefining the balance of power in the Caucasus region, causing a structural deterioration in its relations with Russia that goes far beyond mere occasional diplomatic disagreements. This process is neither accidental nor unilateral, but rather responds to a complex combination of strategic and economic factors that are profoundly transforming regional dynamics⁵.

⁵ SANTIAGO ORTI, Rafael. "La guerra en Ucrania: El declive de la influencia rusa en Asia Central y el Cáucaso".

On the one hand, Azerbaijan's military success in the Nagorno-Karabakh conflict in 2020 and its subsequent consolidation of control over the territory in 2023 demonstrated to the world its ability to act independently of the traditional Russian security umbrella. On the other hand, its strategic alliance with Turkey – increasingly solid in the military, economic and energy spheres – has given it a margin for manoeuvre that was unthinkable just a decade ago. Added to this is its rapprochement with Israel, which has made Baku a key player in the complex geopolitics of the Middle East, precisely at a time when Russia is stepping up its support for Iran.

Competition in the energy sector adds another layer of conflict. While Russia sees Western sanctions limiting its export capacity, Azerbaijan has managed to position itself as an alternative supplier for Europe, expanding the Trans-Adriatic Pipeline (TAP) and strengthening its role in the Southern Gas Corridor.

This economic rivalry inevitably translates into political tensions, especially when both countries compete for influence in the former Soviet republics of Central Asia, traditionally Russia's sphere of influence.

A spiral of tensions with no turning back

The point of no return in this bilateral deterioration could be traced back to the tragic incident involving the downing of the Azerbaijan Airlines plane, whose 38 victims were left in limbo by Russia's half-hearted apologies. Moscow's refusal to assume full institutional responsibility sent a clear message to Baku: in the new regional order, Azerbaijan should resign itself to remaining a secondary player.

However, Azerbaijan's response has been precisely the opposite. Recent events – from the harsh reaction to the raid in Yekaterinburg to the arrest of those responsible for Sputnik Azerbaijan⁶ – show that Baku is no longer willing to accept its traditional role as a junior partner. Every Russian action now meets with a measured but firm response from

Documento de Opinión IEEE 98/2024. Nº 36 (Octubre - Diciembre), 2024. <https://www.defensa.gob.es/ceseden/-/la-guerra-en-ucrania-el-declive-de-la-influencia-rusa-en-asia-central-y-el-c%C3%A1lucaso>

⁶ ROZANSKIJ, Vladimir, “Las muertes de azerbaiyanos en Ekaterimburgo reavivan las tensiones entre Bakú y Moscú”. Asia News, 08/07/2025. <https://www.asianews.it/noticias-es/Las-muertes-de-azerbaiyanos-en-Ekaterimburgo-reavivan-las-tensiones-entre-Bak%C3%BA-y-Mosc%C3%BA-63455.html>

Azerbaijan, in a dangerous dynamic of action and reaction that seems destined to intensify.

The future of relations: confrontation or a new normal?

This growing tension does not appear to be temporary, but rather a reflection of a tectonic shift in regional power relations. With Russia weakened by the conflict in Ukraine and international sanctions, and Azerbaijan strengthened by its military victories, strategic alliances and energy resources, the space for reconciliation seems increasingly narrow. The coming events will be crucial in determining whether the two countries manage to establish a new form of coexistence – perhaps colder and more calculating – or whether, on the contrary, the spiral of tensions leads to an open rupture. What is already clear is that the Caucasus is no longer Russia's undisputed 'backyard,' and Azerbaijan is emerging as the main actor capable of challenging, with increasing success, Moscow's traditional hegemony in the region.

Conclusions

The prolonged confrontation between Russia and Ukraine continues to undermine Moscow's strategic position in multiple dimensions, creating a power vacuum that Azerbaijan has capitalised on with remarkable political skill. With the decisive backing of Turkey as its main ally, Ilham Aliyev's government has executed an unprecedented geopolitical transformation, positioning itself as an indispensable player on the complex Eurasian chessboard and not only challenging traditional Russian dominance in the region but supplanting it.

On the economic front, Baku has implemented a masterful trade diversification strategy that has drastically reduced its historical dependence on Russia. Its energy exports now find their main market in the European Union through the Trans Adriatic Pipeline (TAP), which transports Azerbaijani natural gas to Italy. At the same time, it has deepened its technological cooperation with Israel, especially in defence and intelligence systems, while consolidating a comprehensive economic alliance with Turkey that ranges from mega-infrastructure projects to joint investments in various sectors. This strategic reorientation has been facilitated by its privileged geographical position, which makes it the natural link between European markets and emerging Central Asian trade routes.

The energy sector represents perhaps the most significant triumph of Azerbaijani diplomacy. While Russia faces sanctions that weaken its energy influence in Europe, Azerbaijan has managed to position itself as a key alternative supplier through carefully planned infrastructure. The TANAP system, which crosses Turkey, connects the South Caucasus gas pipeline (Azerbaijan-Georgia) with the Trans-Adriatic Pipeline (also known as TAP, which connects Greece, Albania and Italy) and has established itself as one of the main suppliers of gas to the European continent, with ambitious and feasible expansion plans.

The potential Zangezur Corridor (or Syunik Corridor, as the Armenians call it), currently under negotiation, could exponentially increase its transport capacity by connecting directly to Turkish and European markets. At the same time, recent agreements with Turkmenistan threaten to further marginalise Moscow by offering the Central Asian republics an export route independent of the traditional north-south axis controlled by Russia.

In the geopolitical dimension, Azerbaijan's rise takes on special significance. Its strategic alliance with NATO member Turkey and technological powerhouse Israel provides it with access to advanced military systems and unprecedented international political backing. The victory in Nagorno-Karabakh has not only neutralised Armenia as a regional competitor, but has also demonstrated Baku's ability to impose its terms without the need for traditional Russian arbitration, marking a milestone in the redistribution of regional power. This new reality is reinforced by political instability in Georgia and Tbilisi's economic limitations, which eliminate any possibility of its neighbours challenging Azerbaijani hegemony in the South Caucasus.

This realignment of regional power represents a historic setback for Russia, which sees how its traditional 'backyard' has not only been transformed into an open space of multipolar competition, but also how Azerbaijan is momentarily winning the game on this geopolitical chessboard. The instruments of influence that Moscow has employed for decades (from energy control to conflict arbitration) are losing their effectiveness in the face of Baku's economic pragmatism and strategic resolve.

Azerbaijan, for its part, has demonstrated an exceptional ability to capitalise on Russian weaknesses, combining aggressive energy diplomacy with innovative military alliances. The result is a new balance of power in which Baku emerges as the undisputed regional power, while Moscow faces the most serious challenge to its influence since the dissolution of the Soviet Union, with far-reaching implications that transcend the Caucasus and affect the balance of power throughout Eurasia.

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