

THE WEST SCORES A POINTS VICTORY IN THE SOUTH CAUCASUS

A US-brokered breakthrough in Armenia–Azerbaijan relations advances Western interests.

Russia views this as a threat to its geopolitical ambitions.

Russia is likely to launch an extensive influence campaign against Armenia in 2026.

In August 2025, a potentially historic event occurred in Washington. With the mediation of US President Donald Trump, Armenian Prime Minister Nikol Pashinyan and Azerbaijani President Ilham Aliyev met at the White House and initialled the agreed text of the peace agreement between the two countries.

Contrary to some public interpretations, Armenia and Azerbaijan have not yet signed a peace treaty. The initialling process is the preceding step in which both parties use their initials to confirm and authenticate that they have reached a final agreement on the wording of a treaty that has yet to be ratified. This step officially concludes the negotiations regarding the wording of the peace agreement.

Nonetheless, the meeting, brokered through US diplomacy, was a significant breakthrough for the entire South Caucasus region.

FOUR POINTS

First, the agreement by the Armenian and Azerbaijani leaders on the text of the peace treaty – and their commitment to resolve the conflict through diplomatic means – is a breakthrough in its own right.

Second, it is equally significant that this agreement was achieved without Russia's participation and, indeed, through Western mediation.

Third, Washington also secured framework agreements intended to open a west–east strategic transit corridor running through the South Caucasus and across the Caspian Sea. In addition to benefiting the countries of the region, such a corridor would give the West access to Central Asia, bypassing both Russia and Iran.

Fourth, the United States concluded bilateral agreements with Armenia and Azerbaijan, laying the foundation for a lasting Western strategic presence in both states.

A THREAT TO RUSSIA'S GEOPOLITICAL INTERESTS

From Moscow's perspective, this is an event that could mark the beginning of Russia's



8 August 2025: Azerbaijani President Ilham Aliyev (left), US President Donald Trump and Armenian Prime Minister Nikol Pashinyan shake hands at the White House in the name of peace.

Source: Kevin Lamarque (Reuters)

ejection from the entire South Caucasus. Such an outcome would be a painful psychological and geopolitical blow. Russia has considered the region unequivocally its own since the early 19th century, following its victorious wars against the Ottoman and Persian empires. The “loss” of the South Caucasus would therefore be a traumatic event of historic proportions for the Kremlin.

Russia also views the emergence of what it sees as a Western-controlled belt in the South Caucasus as a threat to its strategic economic interests. Such a belt would geographically isolate Russia from Iran and, by extension, from access to broader Middle Eastern markets and transport infrastructure, including railways and ports.

Being pushed out of the South Caucasus would be a painful psychological and geopolitical blow for Russia.

Finally, Russia sees the success of this project as a threat to its influence and standing in Central Asia. Currently, the landlocked states of Central Asia have essentially two routes to access global markets: one is a land route through Russia, and the other is a route that, to varying degrees, is under China’s control. A Western-controlled alternative transit corridor that crosses the Caspian Sea and runs through the South Caucasus would disrupt this established framework. As a result, Russia would lose its long-standing position as a geographical intermediary, reducing its value, power and influence in the eyes of Central Asian states.

RUSSIA’S RESPONSE: AN INFLUENCE CAMPAIGN AGAINST ARMENIA

For all these reasons, Russia is highly likely to do everything in its power to derail the conclusion of the Armenia–Azerbaijan peace treaty and the creation of the transit corridor named after President Donald Trump.

Because the character of Russia–Azerbaijan relations changed significantly over the course of 2025, Moscow’s best option for undermining President Trump’s initiative is to intervene in Armenia’s domestic politics.

Russia will therefore almost certainly launch a major influence campaign against Armenia in 2026. This campaign will aim to interfere in Armenia’s parliamentary elections, remove Prime Minister Pashinyan from power, and install a government that appears nationalist but is, in substance, under Russia’s control.