

On the Latest Round of Russia–Azerbaijan Encounter

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The recent escalation in Russia–Azerbaijan relations, based on observable indicators, appears to be a deliberate rather than spontaneous development. This new surge in tensions was anticipated given the pervasive atmosphere of mistrust and mutual suspicion that has characterized the bilateral relationship since the *AZAL* passenger airliner crash on December 25, 2024. While the public intensity of the conflict notably subsided two months after a series of reciprocal accusations and unfriendly gestures, continuous monitoring of media and social platforms indicates that underlying friction has persisted within the public sphere, potentially exacerbated by political authorities.

Anti-Russian sentiments have been consistently cultivated in Azerbaijan. Concurrently, public discourse in Russia remained primarily focused on events in Ukraine, with the Azerbaijani “*anti-Russian démarche*” largely framed within the broader narrative of “*global machinations orchestrated by the West against the Russian Federation*”.

Drivers of De-escalation & Underlying Tensions

There is an opinion that Moscow primarily facilitated the political and diplomatic de-escalation immediately following the airliner incident. This included the closure of several criminal investigations against prominent oligarchs of Azerbaijani origin and the provision of new business opportunities to them within the Russian Federation. The following individuals are of particular relevance in this context: Araz Agalarov, God Nisanov, and Zarakh Iliev, all are known for their close ties and business partnerships with Ilham Aliyev’s family. Additionally, Russian political and expert circles with strong Azerbaijani connections have been actively promoting rapprochement with Ankara and Baku, dismissing existing complications and advocating for Azerbaijan’s role as a crucial “window” to circumvent political and economic isolation.

Nevertheless, anti-Azerbaijani sentiments continued to emerge within politicized Russian society. Certain political and expert circles, previously advocating for closer Moscow–Baku ties, have revised their positions, abandoning the notion of an “*unavoidable Russia–Azerbaijan alliance*”. This underscores that despite cautious optimism voiced by politicians, the situation remained volatile, with unresolved contradictions posing a significant risk of escalation.

The Ekaterinburg Incident: A Calculated Action?

Considering these underlying tensions, the recent events in Ekaterinburg appear to be a premeditated action with far-reaching objectives. Moscow must have been aware that Baku, which reacts sensitively to perceived “*acts of oppression and persecution*” against its criminalized diaspora, would inevitably elevate the issue to a political level, potentially even creating (or demonstrating the capacity for) a rupture in relations with Russia. Given the

current sensitivity of the “Azerbaijani case” for the Kremlin and the general specificities of Russian policy towards ethnic minorities, it is highly improbable that the events in Ekaterinburg occurred autonomously or without authorization from the [federal] “Center”. This is particularly true given that the alleged crimes by Azerbaijani organized crime and their diaspora-linked enablers span over two decades. Claims that the Sverdlov region law enforcement only recently uncovered these two-decade-old criminal activities and independently orchestrated a large-scale operation without notifying their superior instances — who, in turn, acted without higher-level sanctions — are met with skepticism.

Conceptual Interpretations of the Ekaterinburg Events

In light of this, two primary conceptual hypotheses regarding the causes and potential beneficiaries of the Ekaterinburg events warrant consideration:

1. **Kremlin-Sanctioned Escalation:** The special operation in Ekaterinburg was authorized at the Kremlin level, intended to create a pretext for deepening the crisis in Russia–Azerbaijan relations, potentially leading to a phase of political confrontation.

2. **Internal Security Faction Initiative:** The raids in Ekaterinburg were initiated by specific factions within Russia’s security structures community in Moscow. Their aim was to present the Kremlin and MFA or RF with a *fait accompli* of unavoidable confrontation with Baku, with the prospect of dissolving “friendly relations”.

Hypothesis 1: Shifting Geopolitical Priorities

The logic of the first hypothesis stems from the evolving geopolitical realities surrounding Russia and a potential re-evaluation of Moscow’s priorities in its southern foreign policy vector. This involves a potential radical reassessment by Vladimir Putin and his team of the program for rapprochement with Turkey and Azerbaijan. Through this initiative, Russia had aspired to overcome isolation and safeguard its interests in the South Caucasus, the Middle East, and Central Asia.

The initiation of Ankara’s liquidation of the Bashar al-Assad “regime” in Syria, and Baku’s *de facto* participation in the Israeli-U.S. military campaign against the Islamic Republic of Iran (IRI) have presented Moscow with the reality of losing strategic positions across a vast region stretching from the Mediterranean to the Caspian Sea. These actions have directly threatened the establishment of the global Russian-Iranian trade and energy project known as “North–South”.

As early as June of 2025, Moscow reportedly abandoned plans for a gas hub in Turkey. This hub was intended to deliver Russian hydrocarbons to European consumers via Turkish territory. Exactly one month later, the Russian nuclear energy company “Rosatom” announced its intention to sell its 49% stake, valued at \$25 billion, in the Turkish “Akkuyu” nuclear power plant project. This clearly indicates Moscow’s effective curtailment of energy cooperation with Ankara, thereby signaling deep-seated global political contradictions with the Turkish side.

In this evolving disposition, Azerbaijan, a strategic ally and conduit for Turkish interests in the South Caucasus, Caspian, and Central Asia, could not remain outside the context of the brewing Russia–Turkey crisis. Specifically, the threat of the Azerbaijani factor for Moscow became evident during the “12-Day War”, where at least Azerbaijani territory was reportedly involved by Israelis in launching air strikes against Russia’s “*strategic partner*” – the Islamic Republic of Iran. This Azerbaijani stance fundamentally contradicts the very philosophy of the “North–South” project, which presupposes the synchronization of geopolitical interests along the Moscow–Baku–Tehran axis and the establishment of an atmosphere of “*friendship and mutual assistance*” among these capitals. Baku’s conduct jeopardized a global program on which Russia had placed great hopes for breaking its isolation to the south – into Southwest Asia and the Indian Ocean.

It is particularly noteworthy that the events in Ekaterinburg precisely coincided with Iran’s accusations against Azerbaijan regarding the provision of its territory and military infrastructure for Israeli strikes against the IRI. On June 26, 2025, Iranian President Masoud Pezeshkian held a telephone conversation with Azerbaijani President Ilham Aliyev, during which, according to Tehran sources, the Iranian politician demanded explanations concerning evidence collected by the IRI regarding Azerbaijan’s support for the Israeli military campaign. A large-scale special operation by Russian security structures against Azerbaijani criminal gangs, integrated with Azerbaijani diaspora structures in the Sverdlovsk region, commenced in Ekaterinburg just a day later, on June 27, 2025. While this could be a mere coincidence, the logic of the “*Kremlin sanction*” hypothesis suggests that Moscow aimed to synchronize its actions with political pressure on Baku, thereby signaling to I. Aliyev that he faces a dual, complex threat. This move presumably compels him to soberly assess the consequences for Azerbaijan should he continue a policy of fracturing the Moscow–Baku–Tehran axis in Turkish, Israeli, and Western interests. The military threat emanating from an undefeated Iran, coupled with the high probability of a revision of the financial and economic interests of the Azerbaijani diaspora and large-scale deportations of Azerbaijani citizens from the Russian Federation, would ideally compel Baku to reconsider its geopolitical calculations.

The effectiveness of such a dual-pressure policy on I. Aliyev remains an open question. However, this elaborated hypothesis is quite convincing given the new geopolitical realities confronting Russia in its southern foreign policy domain.

Hypothesis 2: Internal Power Dynamics

Conversely, the second hypothesis posits that the special operation in Ekaterinburg and the subsequent detentions of ethnic Azerbaijanis in several Russian regions were initiated by a faction within the upper echelons of Russian security services that does not share the view of the need for caution in relations with Azerbaijan. The possibility of an ongoing struggle within Russia’s political and security elites for control over the financial and economic activities of the most significant representatives of the Azerbaijani diaspora in Russia cannot be excluded.

It is known that one of the most influential figures closely connected with the Azerbaijani diaspora in Russia is Sergei Naryshkin, the head of Russia's Foreign Intelligence Service (SVR). He is widely considered the informal patron of major Azerbaijani businesses in the Russian Federation and diaspora structures, acting as the primary intermediary between the Kremlin nomenklatura and Russia's ethnic Azerbaijani oligarchy. On the other hand, according to Russian sources, one of the most significant figures in Russian law enforcement advocating for limiting the growing influence of the Azerbaijani diaspora is Alexander Bastrykin, the head of the Investigative Committee (SK), who has direct access to the highest Kremlin offices. The revival of 20-year-old criminal cases and the detentions in Ekaterinburg were carried out by his agency in close cooperation with the Federal Security Service (FSB), led by Alexander Bortnikov, who is also reportedly a proponent of tightening measures against the "*subversive activities*" and corruption of the Azerbaijani diaspora. This diaspora has been observed to closely coordinate its activities in Russia with Azerbaijani special structures.

It is plausible that the scale and suddenness of the actions taken by the SK and FSB actions in Ekaterinburg were deliberately calculated by the initiators to undermine their opponents' ability within the government to resolve the issue internally, thereby preventing its politicization. If this is indeed the case, the initiators from the SK and FSB have successfully achieved this objective, presenting the Kremlin with a complex political and diplomatic dilemma: either retreat after Baku's counter-actions, thereby de-escalating the situation but losing face, or authorize security forces to toughen measures against the Azerbaijani diaspora, demonstrating firmness and a sovereign character, while further deepening the crisis in relations with Azerbaijan. Either choice presents extreme difficulty for the Kremlin, especially if the initiative for detaining ethnic criminal elements in the Urals did not originate there and lacked far-reaching political objectives.

Outlook:

A Precarious Equilibrium

Ultimately, both Moscow and Baku face an extremely challenging situation, from which each side seeks an avenue of resolution by assessing its own potential losses from a hypothetical deepening of the crisis. The spectrum of interaction and financial-economic benefits from cooperation between these countries is extensive, encompassing trade ties, energy re-exports, remittances, and planned logistical projects, among others. However, it is also crucial to consider that new geopolitical realities in the region, posing significant threats to both sides, could push them towards further radicalization of positions, disregarding multi-billion-dollar losses from a rupture in relations. The true stakes for Azerbaijan could entail a significant risk of losing its sovereignty as a result of a Russian-Iranian understanding, while for Russia, it could mean the final loss of the South Caucasus, a surge in ethnic unrest, and the destabilization of its internal security.

There is a high probability that, given the increasing mutual danger, both sides will, at a certain stage, step back from drastic actions and attempt to de-escalate, while preserving face. This might occur after personal telephone conversations between V. Putin and I.

Aliyev, or a “spontaneous” meeting at a neutral international venue. However, it can be concluded with a high degree of certainty that such an outcome, despite the commonly declared optimism, will not be a “*peace*” but merely another interim “*truce*” that cannot last long. Too many contradictions and misunderstandings have accumulated in Russia–Azerbaijan relations to continue the outdated pretense of positivity and the grandiloquent rhetoric of “*friendship*” and “*brotherhood*”.