

How Russia Benefits from Iran's Dispute with the United States

Iran occupies a prominent role in international politics today due to its clash with the United States over its nuclear energy program. The International Atomic Energy Agency (IAEA) has released several reports on the noncompliance of Iran's program with agency standards, which Iran is required to follow by virtue of being a signatory of the Nuclear Non-Proliferation Treaty (NPT). While Iran has been at odds with Washington since the 1979 Islamic revolution, tensions have risen considerably in the past several years due to Iran's proximity to the American war theater and the rise of a hard-line government prone to vitriolic anti-American rhetoric under President Ahmadinejad. Iran has remained steadfastly defiant in the obfuscation of its nuclear program through several rounds of international sanctions, embargoes, and United Nations Security Council (UNSC) resolutions. Much to the frustration of the US, a significant contributing factor to Iranian stubbornness has been Russian patronage. Russia has continued to provide nuclear expertise and military equipment to Iran while resisting additional sanctions in the UNSC. Moscow claims there is no evidence of an Iranian nuclear weapons program and thus no reason to prosecute Iran so harshly.¹ While that may or may not be true, Russia does benefit immensely from Iran's political and economic isolation and the minor turmoil it creates and this gives Moscow little incentive to cooperate with Washington. While it is in Russia's best interest to maintain the status quo as long as possible, at some point the situation will resolve itself. Iran can submit to IAEA regulations, develop nuclear weapons, or work towards becoming a nuclear threshold state in an attempt to exhaust American patience.

Soviet Relations with Iran

Modern relations between Russia and Iran have their roots in treaties made following Russian

victories in the early 19th century codifying the border between the Russian Empire and the declining Persian Empire. The treaties of Gulistan and Turkmanchai, concluded in 1813 and 1827 respectively, ceded what is now most of modern Georgia and Azerbaijan to Russia. Even more galling were the exclusive rights to navigation and exploitation of the Caspian afforded Russia. Persia maintained its sovereignty but was eventually split into two spheres of influence maintained by the Russian and British Empires as they vied for control of the unclaimed territory between their empires. Following WWI and the Russian Revolution, Iran reasserted control over its northern provinces and forced a treaty in 1921 which confirmed the border between the two countries and granted Iran rights to the Caspian. Tehran had gained with Moscow, but the excesses of the Shahs at the turn of the century had driven the country into debt allowing British businessmen to gain exclusive access to Iran's oil and natural gas. Iran's struggle in the late forties and early fifties to nationalize these resources led to the American coup in 1953 that overthrew the burgeoning democratic government and reinstalled the Shah as ruler. Russia's relations with Iran immediately soured as the Iranian communist party Tudeh had supported the move towards nationalization and the now pro-American Shah considered them a threat to his regime. About a decade later the Shah discovered the strategy—used by so many third world countries during the Cold War—of tilting towards the USSR to squeeze more concessions and weapons out of the US. Soviet-Iranian relations enjoyed a thaw starting in 1962 when the Shah refused to house American missiles on Iranian territory. The Shah remained on the American payroll, but also managed to conclude several lucrative deals with Moscow in the ensuing twenty years.

Three important events with profound effects on Russian-Iranian relations occurred during 1979-1980: the Iranian Revolution, the Soviet invasion of Afghanistan, and the Iraqi invasion of Iran. The Islamic revolution in Iran ousted the Shah and marked the end of American influence in the country. Initially there was hope in Moscow that American advisors could be replaced with Soviet

ones, but the highly religious nature of the revolution, coupled with its aims of exporting Islam to the world, was severely at odds with the strict atheism of the Soviet Union. On a more personal level, Khomeini had not agreed with the influential reformer Mossadegh whom Tudeh had supported in the early fifties.²³ The Soviet invasion of Afghanistan plunged Soviet-Iranian relations into a deep freeze amidst Iranian fears of Soviet encirclement. Tehran then announced that it would refuse any official relations with Moscow while the Soviets occupied Afghanistan.⁴

The Iraqi invasion proved to be a small mitigating factor as the distraction prevented Iran from focusing too much on the Soviet threat to the East. However, Iran was not pleased that Moscow continued to also supply weapons to Saddam Hussein who was enjoying a renewed amount of positive attention from a vengeful United States.⁵

Tensions between Iran and its northern neighbor started to ease in the late 80's, initiated by a letter from Khomeini to Gorbachev praising him for his reforms and expressing the sentiment that Islam could be good for the USSR.⁶ In the few years following this correspondence, events quickly unfolded to remove all barriers to a renewed partnership. The Soviets ended their occupation of Afghanistan in 1989, eliminating the main sticking point and rehabilitation of their relationship began in earnest when the Soviet Union finally disintegrated.

Why Iran Matters to Russia

Today, Russia still lacks a convincing international identity. It has foregone the post dissolution objective of becoming a Western power and has instead returned to following its own agenda. Russia's main foreign policy objective is to regain its status as a world power and facilitate the reemergence of a multi-polar power structure. Russia has taken multiple tracks in pursuing this agenda. In attempting to forge its own identity, Russia has first and foremost strove to differentiate itself from the US. Moscow

has also tried to style itself as an international mediator, a pragmatic and just power free of any political or moral ideology—an alternative to the US. In pursuing this objective a large portion of its efforts are targeted at reducing American influence and power projection. Its most immediate and visible tool for wielding power—emphasizing its differing strategic outlook, and frustrating American designs—has been the United Nations Security Council where it is a permanent member with veto power. Afraid the UNSC might lose its relevance to unilateral American power Russia frequently exercises this option. Supporting Iran in the UNSC has emphasized the differences between American and Russian international policy. Every round of sanctions increasingly casts Washington in a more negative light while making Moscow look much better in comparison. The United States' developing reputation as something of an international bully does little to endear third world countries and makes Russia look like a much more attractive partner.

Iran is Russia's closest Middle Eastern ally, perhaps even to the extent that they could be considered tactical allies.⁷ The early nineties cast Moscow and Tehran together as Russia emerged from the ruins of the Soviet Union and Iran began recovering from the Iraqi assault. Iran's military was in a shambles and considerably less well equipped than the Iraqi military. Russia for its part was in desperate need of cash. Industries such as MinAtom and LukOil, which had been privatized from old Soviet ministries, lacked any sort of oversight and several aspects of foreign policy such as the decision to support the construction of a nuclear plant at Bushehr was guided by their need for contracts.* The two countries were drawn together by their mutual economic need, but Iran is less important to Russia today since Putin reclaimed control of the industries.

Russia and Iran have come to a tacit understanding over influence in Central Asia, but the one issue Iran continues to press is the legal status of the Caspian Sea. The Russo-Persian Treaty of 1921 returned fair use rights to Iran but an unofficial border enforced by the Soviet Union stretching between

the cities of Astara and Gasanguly restricted Iran to about eleven percent of the sea. The creation of the three new littoral states Azerbaijan, Turkmenistan, and Kazakhstan brought about the necessity, and in Iran's view, an opportunity, to reapportion the sea. Naturally, each state sought a solution that would maximize their gains. Iran favors splitting both the seabed and waters equally with each state receiving one fifth of the area. Under this approach each state would also receive veto power over any regional projects. The other states have proposed areas of control proportional to each state's coastline, which would confine Iran to approximately thirteen percent of the sea. Compounding Iran's frustration is that the majority of the mineral resources in the region lie in the northern part of the sea, outside the section bequeathed it by the other states. More conservative elements in Tehran see this as nothing more than a continuation of the Astara-Gasanguly line and have called for Iran to accept nothing less than fifty percent. Russia has signed bilateral agreements with both Azerbaijan and Kazakhstan and is now more or less able to ignore Iranian demands as they do not share a border.⁸

However, especially contentious are the gas fields claimed by both Azerbaijan and Iran. In 2001 an Iranian gunboat chased a British Petroleum research ship to prevent it from completing its mission.⁹ This brought Iran back to Russia's attention vis a vis the Caspian because it considers the region to be solidly within its military sphere of influence and will not tolerate any other country acting unilaterally. In response, Russia held a series of large military exercises in the Caspian.¹⁰ Furthermore, Iran was snubbed when an invitation was not extended to a conference among the four other littoral states in Aktau in September 2009.¹¹ It appears that the summit was actually to discuss the natural gas industries of each country as Russia is opposed to the recent initiatives in each country to diversify their export routes.

The main area of mutual interest to both Moscow and Tehran is maintaining regional stability. Russia doesn't any minor uncertainty and instability in the region—which is certainly helped by Iran's

posturing and erratic behavior—as it discourages Western companies from investing in the area. However, it actively works with Tehran to counter large scale disruptions such as the decades long fight against the Taliban in Afghanistan. Escalated violence prevents Russia from building its own developments. Russia's LukOil had signed a contract to develop Iraq's West Qurna fields with Saddam Hussein in 2002 but it was frozen due to the war.¹² Wars inundate Iran, and to some extent Russia with refugees. Important to both countries is spillover violence from any conflict making its way over the border and causing trouble at home. This is the primary reason both countries put aside their differences in Tajikistan to provide support for Afghani forces opposing the Taliban in the nineties.

How Russia Benefits from Iranian Isolation

Moscow benefits from working directly with Tehran, but it also reaps the benefits from the United States' negative relationship with the country. While the Iranian elite loudly proclaim embargoes and sanctions have no effect on their resolve or their economy, the state of the Iranian natural gas industry indicates the contrary.¹³ Despite having the second largest gas reserves in the world Iran has the most non-associated gas fields and produces less than it uses.¹⁴ The International Energy Agency estimates Iran will be unable to become a significant exporter until at least 2015.¹⁵ This translates into a relatively weak Iran on Russia's southern border that is also preoccupied by its feud with the United States. Iran can't afford to alienate Russia since it is currently its sole benefactor. An Iran more inclined to flex its power in the region could create a considerable amount of trouble in Russia's 'soft underbelly'. Russia was privy to a demonstration of this potential following the breakup of the USSR. The creation of the five new states, Kazakhstan, Uzbekistan, Tajikistan, Turkmenistan, and Azerbaijan touched off a grab for influence in the region by the surrounding countries, most notably Iran, Turkey, and Saudi Arabia. While Iran made very little headway in any of the countries, its bid for power in

Tajikistan prolonged a bloody civil war until it became necessary to cooperate with Russia to combat the rise of the Taliban in Afghanistan. Today, Russia's largest security concern is rising Islamic extremism in the separatist provinces of the Northern Caucasus. Several large scale terrorist attacks such as the 2004 Beslan hostage situation and the more recent bombing of the Moscow metro are one of the largest domestic policy failures of the current administration and a constant source of embarrassment. For the most part, Iran hasn't paid much attention to the region but has been slowly and quietly building Shia support throughout central Asia and Russia's south.

Russia is the world's largest natural gas exporter and Iran has the second largest reserves after Russia. The main benefits Russia receives from Iranian isolation revolve mostly around natural gas. Unlike oil, natural gas can usually only be transported by pipeline. It is possible to transport it as liquefied natural gas (LNG), but to do this requires both liquefaction and regasification facilities at the originating and receiving ports. These facilities and the tankers required are expensive enough that generally only very long term contracts on the order of 25 years or more are currently economically viable. As such, a 'spot market' for natural gas is virtually nonexistent and prices are more resilient than those of oil to global events. While this has precluded the creation of a gas cartel a la OPEC it does tie countries to suppliers and Russia has used this to its advantage to obtain a near monopoly over Europe's gas supply. Ironically, European dependence on Russia gas started in earnest in the seventies when countries began building pipelines to Russia in an effort to diversify energy sources after the OPEC oil embargo.¹⁶ Today Gazprom, Russia's largest gas company, controls nearly all of the gas pipelines to Europe. Other than domestic production, which comes mainly from Norway's North Sea fields, Europe's only other main source of natural gas is Algeria.

When Putin assumed office in 2000, he embarked on the project of reigning in the erstwhile companies formed from the various ministries of the USSR. He has succeeded in turning the large

natural resource corporations of Russia such as MinAtom, LukOil, and Gazprom into effective pseudo-nationalized companies working toward the enhancement of Russian power through monopoly and aggressive expansion. Of these, Gazprom has been the most successful. It has sought to control both the sources and distribution of natural gas to the fullest extent possible. Until very recently the only option the Central Asian republics had for exporting their gas was through Russian territory. Because of this Russia has been able to dictate both the buying and selling price of its gas. Gazprom and even Putin has claimed that Gazprom strives to provide uninterrupted service at a fair price irrespective of politics.¹⁷ However, Russia has a poor history of guaranteeing service along its pipelines, and price disputes with Ukraine resulted in disruption of service to Western Europe when Russia cut supply to Ukraine in 2006 and 2009.¹⁸ The situation has been likened to the mutually assured destruction of the Cold War where Russia and Europe faced off with nuclear weapons, only in this case Europe has no deterrent.¹⁹ Russia has the ability to completely destabilize Europe's energy supply without retribution.

The recent disruptions have brought this vulnerability into sharp focus for the European Union and the search for alternate suppliers has become of vast importance. Due to the geography of Europe and the pipeline nature of natural gas, the only real solution available has been the construction of a pipeline through Turkey in order to gain access to Central Asian and Middle Eastern gas. This pipeline, a joint project by Austria, Hungary, Romania, Bulgaria, and Turkey dubbed Nabucco, is meant to start operation in 2014 and carry up to 31bcm/yr by 2017.²⁰ Ultimately, Nabucco has a goal of providing for more than half of Europe's gas needs.²¹

While the project has suffered many setbacks and faltered several times since its inception in 2002, the partner countries finally signed a contract in 2009.²² Unfortunately, the question of supply, the answer to which has always been a point of contention, still has not been adequately answered. The main potential suppliers are Turkmenistan and Iran. Iran has the second largest reserves in the world

after Russia, who controls nearly thirty percent. Due to uncertainty surrounding new discoveries Turkmenistan's reserves are more difficult to pinpoint, but estimates would probably place it fourth in the world.²³ Other minor suppliers include Azerbaijan (already connected to Turkey), Iraq, and Egypt via the newly built Arab Gas Pipeline running through Jordan, Lebanon, and Syria.²⁴ Qatar shares the large South Pars gas field with Iran and has the third largest reserves in the world, but due to geography is generally limited to exporting LNG. Saudi Arabia, the other country in the region with large reserves, does not export natural gas. These minor players are enough to provide gas through the first years of the pipeline's operation, but in order to bring it to full capacity Turkmen or Iranian gas is necessary.²⁵

While none of the current sanctions on Iran ban importing oil or gas, awarding a contract as large as Nabucco to Iran would completely undermine all efforts at pressuring Tehran. Until the US deems Iran less of a threat, Tehran will not win any contracts. Unfortunately for Europe, this has large implications for the import of Turkmen gas.

Turkmenistan has three routes for exporting gas to Europe. Until very recently, all Turkmen gas was exported through Russia. To avoid traversing Russian territory, any other pipelines to Europe must either pass through Iran or under the Caspian via Azerbaijan. Exporting through Iran runs into the same problems buying Iranian gas does and the EU's leaders have pinned their hopes on the Caspian route. This runs contrary to both Russian and Iranian interests and they have attempted to stall the project by citing ecological and legal concerns.²⁶ Since the legal status of the sea has yet to be determined, it is unclear whether Russia and Iran are entitled to veto powers. Should Azerbaijan and Turkmenistan go through with the project regardless of Russian and Iranian complaints, it doesn't seem unreasonable that Moscow might work with Tehran to decrease the stability of the region and thus make pipeline construction much more difficult if not impossible.

Russia's other response to Nabucco has been the attempt to tighten its grip on Europe's gas

supply and provide fully operational alternatives before Nabucco is completely online.^{27,28} Gazprom is working on the construction of two new pipelines—the South Stream and Nord Stream pipelines. The South Stream pipeline follows nearly the same route as Nabucco, but passes under the Black Sea instead of through Turkey. Austria recently signed on to the project in April signaling that perhaps Nabucco still doesn't enjoy full support in Europe.²⁹ The Nord Stream pipeline, is planned to pass through the Baltic Sea to Germany. In what is probably an attempt to gain more control over Europe's domestic supply, Russian President Medvedev announced Russia will be seeking closer energy ties with Norway and pledged to end the dispute over shared gas fields in the Barents Sea.³⁰ All of these projects are aimed at meeting Europe's gas needs before Nabucco can become fully operational and possibly win long-term contracts precluding the need for Nabucco.

While it lasts, Iran's standoff with the US allows Russia to enjoy Iran's cooperation as well as decreased economic competition. However, eventually the situation will resolve itself in one of three main ways: Iran will decide to submit to IAEA regulations, Iran will develop nuclear weapons, or Iran will become a nuclear threshold state, whereby it has the capability to develop nuclear weapons but chooses not to. There are several subquestions and in most cases Russia stands to gain enough politically or economically to offset any losses. This next section will examine which scenarios Russia prefers and what actions it is likely to take to encourage the desired outcome.

Iranian Submits to IAEA Regulations

If Iran eventually submits to international pressure to conform to IAEA standards it is unlikely that the United States could prevent Iran from concluding a gas deal with Europe even if it wanted to. The only other large international issue involving Iran is its sponsorship of the anti-Israeli terrorist organization Hezbollah, which is not a compelling enough reason to enforce sanctions of any

substantial magnitude. Russia will lose economically but stands to gain politically. If Iran does decide to come around it will most likely do so through Russia by accepting an offer made by Moscow. Working with the Kremlin is far more palatable than dealing with Washington. Orchestrating a deal would bolster Russia's credentials and possibly give it a little more international influence.

If Iran makes amends with the US, Europe will be free to conclude a gas deal with Iran leaving Moscow to find another way to protect Gazprom's monopoly. Russia has no real direct influence in Iran, and Tehran is only beholden to Russia as long as it has no other options. Moscow has no way to block a deal with Nabucco through negotiations with Iran since it makes little logistical sense for Russia to buy Iranian gas. Russia's only strategy is to either gain control of the gas fields or pipelines feeding Turkey through Gazprom or encourage enough contracts with other countries such that Iran is unable to adequately supply Europe. Iran has a national policy of buying back all assets from any companies contracted to develop fields or pipelines which would prevent Gazprom from ever owning a controlling stake in any venture. However, it is interesting to note that IGAT-9, Iran's latest export pipeline to Turkey, may be offered under a build-own-operate contract providing Gazprom a potential entry point to Iran's gas industry.³¹

The alternate solution, while not as good for Moscow because it allows other countries to compete with it in Iran's market, is to encourage investment from China and India. If enough of Iran's infrastructure is tied up in supplying other countries, Iran will be unable to supply Europe with enough gas to disrupt Russia's monopoly. Towards this goal Gazprom has gotten involved in the construction of a planned pipeline from Iran to India via Pakistan.³² The IPI pipeline, as it is known, is currently only slotted to serve Pakistan as India has not committed to the project due to concerns over the security of the pipeline.³³ However, India may still join the project at any time. Since Gazprom has a vested interest in the pipeline it is likely that Moscow will work to assuage Indian fears.

The worst case for this scenario, however, is a regime change or revolution in Iran that would make it more likely to deal with the US directly or even make amends. If this happens, there is very little Russia can do as Western investment in the region will quickly follow.

Iran Develops Nuclear Weapons

Russia has little reason to worry if Iran develops a nuclear weapon. It does lose some amount of security and room to politically maneuver, but these losses are minimal and overshadowed by the increased ability to maintain a monopoly over Europe's gas. An Iranian bomb would shut down the prospect of a pipeline deal with Europe and potentially make it easier for Russia to block the construction of a Caspian pipeline.

Russia's loss of security will not come from a direct threat—the two countries are friendly towards each other and Russia has already spent several decades with nuclear states at its borders. Instead, Russia would be worried about nuclear terrorism stemming from the Caucasus should an Iranian bomb get loose. This seems an unlikely scenario though for a few reasons. First, any bombs Iran has will be extremely precious and thus securing their safety will be a primary concern. Secondly, the political consequences of an Iranian sourced weapon going off in Russia would be dire. It is unlikely that Russia would continue to support Iran even marginally if that happened. Since the consequences of losing a bomb would be so disastrous, both operationally and politically, Iran would make sure no weapons accidentally wandered off. Third, since it would be much easier for a potential terrorist to obtain a nuclear device or material from within Russia itself, the fact that Iran also has nuclear material does not significantly raise the chances of a domestic nuclear terrorist attack.

Russia has maintained that Iran is not pursuing a nuclear weapon and being forced to concede that Washington had been correct would be a blow to its credibility. Russia would also be forced to

take a back seat to the US on any initiatives made to resolve the situation. The US would enjoy a bump of international support and would be able to use the event to increase its presence and influence in Central Asia. Countries such as Kyrgyzstan which have started to revoke American military lease contracts under pressure from Moscow might be inclined to reconsider when faced with a nuclear Iran.

It is unlikely that Iran will actually construct a nuclear weapon because there would be too many negative consequences. It is more likely that it will instead strive to obtain the capability of constructing a nuclear device in order to use the implicit threat to increase its international clout. This is the best scenario for Russia as it prolongs the status quo and gives it time to prepare for when Iran making amends with the West. If it becomes clear Iran will not actually construct any devices it is only a matter of time before support for sanctions crumbles in Europe.

As Russia has no compelling reason to hasten Iran's compliance with the IAEA it is unlikely to support additional sanctions. However, Moscow will be ready to cut a deal with Iran should it come around.

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