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The Geopolitical Future of the South Caucasus – Poghosyan, B.

The report analyzes the geopolitical transformation of the South Caucasus amidst the evolving global landscape. It examines key external factors impacting the region and evaluates the future developments in Armenia, Azerbaijan, and Georgia. This includes the perspectives of Armenia–Azerbaijan negotiations, Armenia’s foreign policy diversification, choices faced by Georgia, and shifts in Azerbaijan’s foreign policy. Special emphasis is placed on the role of external actors, such as the EU, Russia, Türkiye, and Iran, in shaping regional dynamics. The report concludes with recommendations to foster a more stable, secure, and prosperous South Caucasus, emphasizing the need for cooperative regional initiatives.

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List of Abbreviations

BRICS: Intergovernmental organization comprising Brazil, Russia, India, China, South Africa, Iran, Egypt, Ethiopia, and the United Arab Emirates

CSTO: Collective Security Treaty Organization

COP29: 2024 United Nations Climate Change Conference

EAEU: Eurasian Economic Union

EU: European Union

EPC: European Political Community

FMs: Foreign Ministers

INSTC: International North-South Transport Corridor

OSCE: Organization for Security and Co-operation in Europe

PM: Prime Minister

NATO: North Atlantic Treaty Organization

US: United States

Foreword

In the past four years, the South Caucasus has experienced geopolitical turbulence that has significantly altered the regional status quo. The 2020 Nagorno-Karabakh War, the Russia–Ukraine War, Azerbaijani incursions into Armenia in 2021 and 2022, Azerbaijan’s military takeover of Nagorno-Karabakh in September 2023, and the forced displacement of Armenians have created a new reality on the ground. The transformation of the world order, the Russia–West confrontation, the gradual involvement of Global South actors in the region, the emergence of new transit and trade routes, climate change, and the rapid development of disruptive technologies have amplified the impact of these events. The South Caucasus now finds itself amid great power competition and regional rivalry, while internal conflicts threaten its stability and development.

In this environment, analyzing regional developments and assessing the future of South Caucasus geopolitics is crucial for all interested in a peaceful and prosperous region. This allows for a better understanding of current developments and better preparation for the future.

APRI Armenia is an independent think tank focused on regional security, sustainable development, and civic engagement. It values the opportunity to collaborate with the Friedrich Naumann Foundation for Freedom in preparing a report on the region’s geopolitical future.

This project’s methodology consisted of in-depth desk research, interviews with Armenian, Azerbaijani, and Georgian experts, and a closed discussion in Tbilisi with these experts, all conducted between July 2024 and September 2024. APRI Armenia extends its gratitude to all participating experts—Ahmad Alili, Anna Davtyan-Gevorgyan, Viktor Kipiani, Johnny Melikyan, Murad Muradov, Tornike Sherashenidze, Anar Valiyev, and Olesya Vartanyan — for their valuable insights.

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1. External factors and actors influencing the region

1.1 Transformation of the global order

All the experts interviewed for the project identified the ongoing transformation of the global order as one of the most significant factors affecting South Caucasus geopolitics. There was near-unanimous agreement that the unipolar world is over and that we are transitioning toward a multipolar or fluid bipolar order, which will be more complex and prone to conflict. Some experts believe that at the end of this transition, a new bipolar world will emerge, where the collective West, led by the United States, will face a China–Russia alliance. Others argue that the emerging order will be multipolar and that non-Western groupings, such as the Shanghai Cooperation Organization and BRICS are likely to will gain influence as the power of the West declines.

Many global experts contend that one defining feature of this new order will be great power competition,¹ with the US, Russia, and China as the key players. This competition may encompass many regions, including the South Caucasus. Some experts interviewed for the project believe that in addition to great

power competition, the emerging global order will result in increased regional rivalry, with Türkiye and Iran’s growing involvement in the South Caucasus signaling the rise of such rivalry.

Several experts argued that in the new order, hard power will dominate, alongside economic nationalism and a focus on hybrid warfare. Permanent alliances, they contend, will become relics of the past, replaced by more fluid regional alliances. Thus, we will see more rivalry for regional hegemony between regional and global players, with greater instability and more conflicts. The concept of spheres of influence will return, with each great power maintaining its sphere.

One common theme among all the experts interviewed was the belief that, at least in the short to mid-term, the global transition will bring instability to the region, as the South Caucasus may become another arena for great power competition.

1.2 Impact of the Russia–Ukraine War and Russia–West confrontation

All experts interviewed for the project agreed that the most significant external factor affecting South Caucasus geopolitics is the outcome of the war in Ukraine. Nearly all experts considered that Russia intends to remain in the region, regardless of the war's results.

However, if the outcome is unfavorable for Russia, it will become increasingly dependent on others. Russia will likely have to consider the interests of China, Iran, and Türkiye in the region to counter the West. In this scenario, Russia would become one of several regional players and could not significantly limit Western involvement.²

If Russia prevails in Ukraine—however that manifests on the ground—experts believe it will be able to allocate more resources to the South Caucasus, strengthening its presence. This might impact Armenia's foreign policy trajectory. It could also reinforce the current Georgian government's move to distance itself from its Euro-Atlantic integration aspirations, especially if the Georgian Dream remains in power after the 26 October 2024 elections.

Another pattern of Russia's relations with the region after the start of the war in Ukraine booming economic relations with Armenia and Azerbaijan. Armenia–Russia trade reached US\$7.3 billion in 2023, growing by 43%.³ In 2024, the growth has accelerated. Over the first six months alone, bilateral trade accounted for \$8.4 billion.⁴ As President Putin stated during his state visit to Azerbaijan in August 2024, Azerbaijan–Russia trade has exceeded \$4 billion and was steadily growing, adding 17% in the first six months of 2024.⁵

Russia is also interested in the restoration of communications in the South Caucasus, to have access to Iran and Türkiye, and via these countries to Southeast Asia and the Middle East.

One constant, irrespective of the war's outcome, is Russia's negative stance on Western presence in the region. In the short to mid-term, Russia is expected to view Western involvement unfavorably and will take steps to limit it. Experts participating in the project agree that the Russia–West confrontation will persist for the foreseeable future, likely making the South Caucasus an ongoing arena for this rivalry.

In this context, Russia may view the 3+3 format⁶ as an essential tool to counter Western influence and manage the region with Türkiye and Iran. While Russia is unlikely to trust Tehran or Ankara fully, it may view their controlled involvement in the South Caucasus as a preferable alternative to direct Western influence. Russian officials have reiterated their support for this format,⁷ having organized the first meeting in Moscow.⁸

1.3 US foreign policy prospects in the region after the 2024 elections

The Biden administration has pursued active engagement in the South Caucasus. The United States has been one of the key mediators in Armenia–Azerbaijan negotiations, organizing several meetings between Armenian and Azerbaijani foreign ministers in Washington in 2022–2024⁹ and a meeting between Prime Minister Nikol Pashinyan and President Ilham Aliyev in February 2023.¹⁰ The US also increased its engagement with Armenia, aligning with the administration’s broader efforts to support democracy globally.¹¹ US–Russia confrontation has shaped US policy in the region, with Washington viewing the Armenia–Azerbaijan peace process and Armenia–Türkiye normalization as a tool to reduce the dependence of

South Caucasus and Central Asian countries on Russia and China.¹²

The US expressed its interest in opening up trade routes connecting Central Asia with Europe via Azerbaijan, Armenia, and Türkiye to create alternatives for Central Asia and reduce its dependence on Russia and China.¹³

In this context, the upcoming US presidential elections in November 2024 are likely to be of major importance in determining US foreign policy in the region. If Kamala Harris wins, US foreign policy likely will not change drastically, although continued interest in the South Caucasus is not guaranteed. The situation is more uncertain in the case of a second Trump presidency. Interviewed experts emphasized the challenge in assessing Donald Trump’s foreign policy in general and his views on the South Caucasus in particular. The prevailing perception is that US involvement in the South Caucasus would likely decrease under Trump. The two motives behind the Biden administration’s push—supporting democracy and countering Russia—may not hold the same relevance for a Trump administration.

Some experts argued that the direct involvement of the US in the South

Caucasus would decrease regardless of who wins the election. The US may focus on supporting the European Union's efforts in the region, seeking to maintain a Western presence through the EU. Others contended that despite some symbolic gestures toward Armenia, the US would not take any significant action against Azerbaijan beyond the joint military drills between Armenian and US armed forces¹⁴ and the emerging strategic partnership.¹⁵

The overall assessment was that the region should prepare for reduced US involvement, a development that could happen even more swiftly if Trump returns to the White House in January 2025.

1.4 The EU's role in the South Caucasus

The European Union significantly increased its involvement in the South Caucasus following the second Nagorno-Karabakh War in 2020. In late 2021, the EU established the Brussels format of negotiations. Armenian and Azerbaijani leaders participated in six trilateral meetings facilitated by European Council President Charles Michel (in December 2021, April, May, August 2022, and May and July 2023). Additionally, two meetings occurred on the sidelines of the European Political Community summits

in October 2022 and June 2023. As a result of these meetings, Armenia and Azerbaijan stated their recognition of each other's territorial integrity under the 1991 Alma-Ata Declaration. The EU launched a short-term observer mission in Armenia in October 2022,¹⁶ followed by a two-year mission that began its activities in February 2023.¹⁷

The EU and Armenia have significantly deepened their cooperation. In February 2024, they began working on the EU–Armenia New Partnership Agenda.¹⁸ The EU agreed to start visa liberalization dialogue¹⁹ and allocated €10 million in support from the European Peace Facility.²⁰

The EU launched a strategic energy partnership with Azerbaijan after the start of the war in Ukraine.²¹ Politically, the EU has also emphasized the importance of the “Middle Corridor,” which connects the EU to Central Asia and China while bypassing Russia and Iran.²² In December 2023, the EU granted Georgia candidate status, calling enlargement its greatest geopolitical tool.²³ However, recent developments in Georgia have complicated relations with Brussels, making EU–Georgia relations uncertain, as the EU announced that Georgia's accession has been stopped following its adoption of the Foreign

Influence law, under which Western-backed media and nongovernmental organizations will be termed “foreign agents.”²⁴

Some experts interviewed during the project believe that the EU would continue to increase its involvement in the region, focusing on its relations with Armenia and Georgia. However, others who took part in the project argue that the EU lacks a coherent policy in the South Caucasus, as different member states pursue divergent objectives—France supports Armenia, while Italy, for example, supports Azerbaijan. The lack of coherent EU foreign policy toward the South Caucasus was emphasized in the APRI Armenia report on Armenia–EU relations.²⁵ These conflicting interests among member states could hinder the EU from developing a more cohesive regional strategy.

What’s more, European Commission President Ursula von der Leyen’s presentation of the political guidelines for the next European Commission (2024–2029), which emphasize European defense and security and focus on the Mediterranean and Western Balkans, may indicate that the EU’s involvement in the South Caucasus could decrease.²⁶

1.5 Türkiye and Iran: Regional rivalry or cooperation?

Türkiye and Iran have historically played a role in the South Caucasus, with their relationship primarily characterized by competition. After the end of the first Nagorno-Karabakh War, Iran was content with the post-1994 status quo, while Türkiye aligned with Azerbaijan to pressure Armenia to end what it called the “Occupation of Nagorno-Karabakh” and closed its borders with Armenia in 1993. Türkiye played a crucial role in the 2020 Nagorno-Karabakh War, supporting Azerbaijan by supplying weapons and deploying military advisors, and, according to some sources, mercenaries from Syria.²⁷

Türkiye and Iran regard the South Caucasus as a vital geopolitical and geo-economic region. Türkiye is seeking to expand its presence and influence in the region, largely through its strategic alliance with Azerbaijan, solidified in the June 2021 Shushi Declaration. Türkiye also views the South Caucasus as a gateway to Central Asia and supports the establishment of the “Zangezur Corridor.”²⁸

Following the 2020 Nagorno-Karabakh War, Armenia and Türkiye initiated a normalization process,²⁹ a renewed effort after the failed “football diplomacy” of 2008.³⁰ After

several meetings, the two countries agreed in July 2022 to open the Armenia–Türkiye border to third-country nationals and establish direct cargo flights.³¹ The leaders of both nations met several times, and Prime Minister Pashinyan attended President Erdoğan’s inauguration in June 2023.³² Türkiye constantly states that any significant progress in Armenia–Türkiye normalization would be possible only after an Armenia–Azerbaijan peace agreement,³³ which has stalled the implementation of the agreements reached. Türkiye supports Azerbaijan on Baku’s demands to change the Armenian constitution and to open the so-called “Zangezur Corridor” to link Azerbaijan with Nakhchivan and Türkiye via Armenia.³⁴

In the wake of the 2020 Nagorno-Karabakh War and amid growing demands from Azerbaijan to establish the “Zangezur Corridor,” Iran stated it would not tolerate any changes to internationally recognized borders.³⁵ Iran conducted several military drills along its border with Azerbaijan in 2021 and 2022 to reinforce its stance.³⁶

Conversely, Iran is focused on curbing Türkiye’s growing influence. It sees the region as a critical gateway to Europe via Armenia, Georgia, and the Black Sea, as part of the “Persian

Gulf–Black Sea” multimodal transport corridor.³⁷

Some experts interviewed during the project believe that Masoud Pezeshkian’s election as Iran’s new president may lead to changes in Iranian foreign policy, including its approach to the region. During a meeting with Prime Minister Pashinyan on July 30, Iran’s Supreme Leader reiterated his opposition to the “Zangezur Corridor,” calling it detrimental to Armenia.³⁸ Therefore, under its current leadership, significant changes in Iran’s South Caucasus policy appear unlikely. Having said that, we may assume that major escalation in the Middle East could change Iran’s position.

1.6 China and India: Emerging voices of the Global South in the South Caucasus

China and India are relatively new players in the South Caucasus. China’s interest in the region grew after President Xi Jinping launched the Belt and Road Initiative (BRI) in September 2013,³⁹ with the South Caucasus seen as a potential land route connecting China to Europe. The first practical step in increasing China’s presence in the region was signing the China–Georgia free trade agreement.⁴⁰ China and Georgia took another significant step in July 2023 by signing a strategic partnership agreement.⁴¹ Meanwhile,

Azerbaijan, Georgia, Türkiye, and Kazakhstan have actively promoted the idea of the Trans-Caspian or “Middle Corridor,” which would link China to Europe via Kazakhstan, the Caspian Sea, the South Caucasus, and Türkiye.⁴² Another milestone in China’s involvement in the South Caucasus was the signing of the Azerbaijan–China strategic partnership agreement in July 2024.⁴³

Additionally, a Chinese-led consortium won the bid to construct a new port on Georgia’s Black Sea coast, a key development for the launch of the “Middle Corridor.”⁴⁴ Simultaneously, China is seeking to deepen its engagement with Armenia. Direct Yerevan–Urumqi flights were launched in September 2024, and China’s acting chargé d’affaires recently stated that China is “ready to enhance cooperation with Armenia in all areas.”⁴⁵

India has also increased its presence in the South Caucasus, with a focus on Armenia following the 2020 Nagorno-Karabakh War. A new chapter in Armenia–India relations began with the visit of Indian Foreign Minister Subrahmanyam Jaishankar to Armenia in October 2021.⁴⁶ India supported Armenia at the United Nations Security Council after Azerbaijan’s aggression in September 2022, and

Armenia fully endorsed India’s position on the Kashmir issue.⁴⁷ In October 2022, the Armenian defense minister visited India to initiate defense cooperation.⁴⁸ Various Armenian and Indian delegations exchanged visits in 2023, including one led by the Secretary of the Security Armenian Council. Armenian Foreign Minister Ararat Mirzoyan participated in the Raisina Dialogue 2023, while Minister of Labor and Social Affairs Narek Mkrtchyan attended the Raisina Dialogue 2024.⁴⁹ In 2023, India became Armenia’s primary arms supplier, effectively replacing Russia with the overall package estimated between US1.5 and 2 billions.

Several factors have influenced Armenia and India’s moves to strengthen their partnership. These include the growing importance of the South Caucasus for India as a transit route to Russia and Europe and India’s broader vision of expanding its influence beyond its immediate surroundings into the “extended neighborhood,” which includes the South Caucasus. India’s role as a significant player in the emerging multipolar world, coupled with Armenia’s need to diversify its foreign and security, also plays a key role. The deepening Azerbaijan–Pakistan partnership and the Azerbaijan–Pakistan–Türkiye strategic coopera-

tion framework have influenced India's regional policy-making.

Meanwhile, India is also developing relations with Georgia and Azerbaijan. India has direct flights to both countries,⁵⁰ and purchases oil from Azerbaijan, though no direct flight connects India to Armenia.⁵¹

However, China and India still lag behind other external actors in their involvement in the South Caucasus. According to experts interviewed for the project, despite their growing engagement, neither China nor India currently wields decisive influence in the region, and this situation may be unlikely to change significantly over the next five to six years.

1.7 Corridor wars or shared benefits?

One of the persistent features of South Caucasus geopolitics following the Second Nagorno-Karabakh War has been the discussion of transit corridors across the region. As previously mentioned, Kazakhstan, Azerbaijan, Georgia, and Türkiye have been promoting the "Middle Corridor" as an alternative route connecting China with Europe, bypassing Russia and Iran. Talks about this corridor began in parallel with the construction of the Baku–Tbilisi–Kars railway. On November 7, 2013,

during the II International Transport and Logistics Business Forum "New Silk Way" in Astana, the leaders of Kazakhstan Temir Zholy, Azerbaijan Railways, and Georgian Railway signed an agreement establishing a coordination committee to develop the Trans-Caspian International Transport Route. These discussions gained more attention after February 2022, as Russia's invasion of Ukraine and subsequent Western sanctions cast doubt on the viability of the China–Russia–Europe land route.

In November 2023, the World Bank published a special report on the "Middle Corridor," offering recommendations on how to triple freight volume and halve travel time by 2030.⁵² Notably, according to the report, the primary added value of the "Middle Corridor" will be the increase in regional trade among the regional countries, rather than focusing solely on China–Europe trade. The United States has also emphasized use of this route by Central Asian countries, to access Europe while bypassing Russia and China, reducing their regional influence.⁵³

Another connected issue is Azerbaijan's demand for Armenia to establish the so-called "Zangezur Corridor," which would connect Azerbaijan with

the Nakhchivan Autonomous Republic and Türkiye via Armenia. Azerbaijan argues that there should be no controls for Azerbaijani citizens and goods traveling between Azerbaijan and Nakhchivan.⁵⁴ Azerbaijan has framed the “Zangezur Corridor” as a key segment of the “Middle Corridor,” attempting to secure the support of countries involved in the project. Thus, Azerbaijan is seeking to portray the “Zangezur Corridor” as an economic project, while it is a geopolitical one, designed to increase Azerbaijan’s and Türkiye’s influence in the South Caucasus.

Meanwhile, in 2000, India, Russia, and Iran initiated the project of the International North–South Transport Corridor (INSTC) to connect India with Europe via Iran, the South Caucasus, and Russia.⁵⁵ International sanctions on Iran hindered the development of this project. After February 2022, interest in connecting Russia with India increased as Russia sought to shift its trade routes from the West to the East. Russia agreed to provide a loan to Iran to complete its railway, which would create a unified system spanning from Iranian Persian Gulf ports to Russia. Iran, in turn, has advanced the “Persian Gulf–Black Sea” corridor project, which would connect Iran to Europe via Armenia, Georgia, and the Black Sea. Some experts participat-

ing in the project believe that India may also use this corridor as an alternative route to Europe. In this context, the Persian Gulf–Black Sea corridor may be integrated into the INSTC.

The Armenian government presented its vision for regional connectivity, the “Crossroads of Peace” project, in October 2023 at the Silk Road Forum in Tbilisi. This vision entails opening all communications, based on the principles of sovereignty of states, jurisdiction over infrastructure passing through their territories, equality and reciprocity, allowing Azerbaijan to reach Türkiye via Armenia and Iran to reach Georgia, the Black Sea, and Russia via Armenia. The Armenian government has taken steps to improve logistics in its southern Syunik province, which borders Iran, though these projects will require time to implement.⁵⁶

The transit corridors in the South Caucasus are closely tied to geopolitical struggles between regional and global powers, creating additional challenges for their realization. As experts noted during interviews, there is evident rivalry between Russia and the US regarding these corridors, each seeking to restore communications with its involvement. As the world order shifts from a unipolar system to a more complex

structure, regional and global powers will likely continue their competition in the South Caucasus, complicating the restoration of regional communications.

1.8 The impact of climate change on the South Caucasus

Climate change is a relatively new factor influencing global geopolitics and geo-economics. Extreme heat, dwindling drinking water resources, and rising food insecurity are increasing pressure on countries that are more vulnerable to the effects of climate change. While the South Caucasus may not be at the forefront of these developments, climate change and its related impacts will not bypass the region. A key issue in the South Caucasus is water management. All three countries face problems arising from inadequate water management practices, and the lack of regional cooperation exacerbates the situation. The international community has initiated regional cooperation and dialogue on water management. Water dialogue has been a component of initiatives such as the Economic Connectivity: Armenia–Azerbaijan Dialogue Series, organized by the Berlin-based Hertie School and the Restart Initiative, as part of EU-funded projects such as EU4Dialogue and EU4Peace.⁵⁷ In July 2023, USAID launched the South Caucasus Regional Water Manage-

ment Program. Switzerland also puts emphasis on Climate resilience and sustainable resource management in its 2022–2025 cooperation project for the South Caucasus.⁵⁸ However, much remains to be done to establish a functional regional framework for addressing water management and broader climate change-related issues.

Water scarcity began to be an issue for Azerbaijan a few years ago,⁵⁹ and several estimates suggest that the situation will worsen in the next 10 to 15 years.⁶⁰ Some experts believe that water scarcity may have been one of the factors behind Azerbaijan’s incursion in 2021 into the Gegharkunik region of Armenia, where Lake Sevan is located. Lake Sevan, the largest freshwater lake in the Caucasus region, is a critical source of fresh water and irrigation.

Experts interviewed during the project believe that climate change and related issues, including water scarcity and the improvement of water management systems, could become topics that foster dialogue and cooperation in the region.

2. Regional developments

2.1 Is the South Caucasus a region beyond the geographical sense?

Since the collapse of the Soviet Union in 1991, the term “South Caucasus” has entered global geopolitics, referring to the region between Russia, Türkiye, Iran, and the Caspian Sea. During Soviet times, it was known as Transcaucasia, and there was the Transcaucasian Federative Soviet Republic. This republic dissolved in 1936 when the Armenian, Georgian, and Azerbaijani Soviet Socialist Republics joined the USSR as separate republics. Over the past 33 years, abundant literature has emerged on South Caucasus geopolitics and geo-economics.

Even though the term “South Caucasus” has existed for more than three decades, the area still lacks the characteristics of a coherent region. No regional economic, political, or military organizations or agreements have been signed by all three regional countries. Since gaining independence, Armenia, Azerbaijan, and Georgia have pursued different policy agendas. At first, Armenia established a strategic alliance with Russia and joined the Collective Security Treaty Organization and the Eurasian Economic Union.⁶¹ Georgia declared its intention to join the EU

and NATO, signed an association agreement with the EU in 2014,⁶² and obtained EU candidate status in December 2023. Azerbaijan pursued a balancing foreign policy, championing a non-aligned position, while establishing strategic relations with Türkiye based on shared ethnic and linguistic ties. Another factor contributing to regional fragmentation has been the ethno-political conflicts of Nagorno-Karabakh, Abkhazia, and South Ossetia.

New geopolitical developments have been underway in the region. After the 2020 Nagorno-Karabakh War, and especially following Azerbaijan’s incursion into Armenia in September 2022, Armenia launched a policy of diversification or “pivot to the world,” increasing its cooperation with the EU, the US, France, and India, among others. Yerevan has effectively suspended its participation in the CSTO, and Armenia–Russia defense cooperation has significantly decreased.⁶³ Georgia’s relations with the West deteriorated after it adopted a foreign influence law in 2024. The US and the EU suspended financial support to Georgia,⁶⁴ and the US canceled military drills scheduled in 2024.

Azerbaijan deepened its cooperation with Türkiye, signing a strategic alliance agreement in June 2021 and emphasizing its relations with Turkic states, seeing them as a key foreign policy priority.⁶⁵

Despite the ups and downs in regional geopolitics over the last 33 years, the South Caucasus countries lack common economic, political, and military structures. Georgia and Armenia launched a strategic partnership only in January 2024. Thus, there are grounds that the South Caucasus lacks elements to be considered a coherent region from a geopolitical and geo-economic perspective.

All experts interviewed during the project agree on this point. However, there are differing views on how to transform the South Caucasus into a “real region.” Some Armenian and Georgian experts believe that, in the long term, European integration could bring Armenia and Georgia closer, making part of the South Caucasus more integrated. At the same time, Azerbaijan will continue to look to Turkic states as its primary partners. Azerbaijani experts argue that regional integration should begin by fostering ties between the South Caucasus and Central Asia, creating a Caucasus–Caspian region, which

could facilitate integration within the South Caucasus. However, all agree that it will take years, likely a decade, before we can speak of the South Caucasus as a coherent political and economic region.

2.2 Armenian foreign policy diversification

Since 2020, Armenia has faced multiple crises. The economy suffered a significant blow due to the COVID-19 pandemic, followed by defeat in the 2020 Nagorno-Karabakh War, Azerbaijan’s incursion into Armenia in 2021 and 2022, and Azerbaijan’s military takeover of Nagorno-Karabakh in September 2023, which led to the forced displacement of Armenians. These events have profoundly affected Armenia’s foreign and domestic security. The defeat in the 2020 Nagorno-Karabakh War triggered a political crisis, culminating in snap parliamentary elections in June 2021. The ruling Civil Contract Party won a majority, and Nikol Pashinyan continued to serve as Armenia’s prime minister. Domestic instability persisted, with two movements attempting to oust Pashinyan in April–May 2022 and May–June 2024. These internal challenges partly coincided with the transformation of the world order and the beginning of the Russian war of aggression in Ukraine in February 2022.

Under these conditions, Armenia's foreign policy approach changed. The collapse of the Nagorno-Karabakh Republic and the forced displacement of Armenians from Nagorno-Karabakh have also heightened Armenia's security challenges, necessitating a new security architecture.

One response to these challenges has been the further diversification of Armenia's foreign policy. Since independence, Armenia has pursued diversification—to some extent—developing relations with the EU, NATO, and the US, the so-called “complementarity” policy under Vartan Oskanian, Armenian Minister of Foreign Affairs in 1998–2008.

Armenia joined the North Atlantic Cooperation Council in 1992 and the Partnership for Peace program in 1994. In 2005, Armenia signed its first Individual Partnership Action Plan with NATO.⁶⁶ NATO has been actively involved in Armenia's defense reforms, particularly after 2008, including defense education and strategic defense reviews. Armenia also joined the EU's Eastern Partnership initiative in 2009. After failing to sign an association agreement with a deep and comprehensive free trade area, it did sign the Comprehensive and Enhanced Partnership Agree-

ment in 2017, which now serves as the foundation for Armenia–EU relations.

Since 2020, further diversification has intensified, leading to the development of bilateral relations with India, France, the US, and the EU. Armenia has signed multiple arms supply agreements with India and recently with France to boost its defense capabilities and signal to Azerbaijan that future attacks on Armenia would not be easy.

Diversifying security relations can also involve strengthening ties with traditional partners and launching new strategic partnerships. In the context of diversification, developing relations with the Arab world is also crucial, and establishing diplomatic relations with Saudi Arabia is a step in that direction.

Security and foreign policy diversification has helped Armenia to strengthen its deterrence strategy. However, this creates risks when the policy is not followed in the economic realm. More than 40% of Armenia's exports go to Russia and Armenia imports a significant portion of its energy and grain from Russia. This high level of dependence creates vulnerabilities. Economic diversification is a long-term and complex process,

and politically motivated haste could harm local businesses.

In the coming years, Armenia's foreign policy should focus on deepening relations with new security partners while working on rebalancing its economic dependencies on Russia and reducing opportunities for Russian retaliation.

2.3 Georgia: Domestic polarization and uncertain foreign policy orientation

Georgia has grappled with domestic political instability and growing polarization in recent years. The events of June 2019, known as the "Night of Gavrilov," triggered large-scale street protests⁶⁷ and led to a change of government. Political instability continued in 2020, before, during, and after parliamentary elections, resulting in another government change in February 2021.⁶⁸ The Georgian political system appeared to overcome the standoff in April 2021 through the mediation of European Council President Charles Michel.⁶⁹ However, the return of former president Mikheil Saakashvili ahead of the 2021 local elections and his subsequent arrest triggered another wave of instability.⁷⁰

Domestic political polarization has persisted in the lead-up to the Oc-

tober 2024 parliamentary elections, with discussions about the future orientation of Georgia's foreign policy taking center stage. In June 2022, the EU granted candidate status to Ukraine and Moldova while recognizing Georgia's European aspirations and calling for further reforms.⁷¹ In this environment, the Georgian government introduced a draft "foreign agent law," drawing criticism from its Western partners and opposition. In March 2023, the Georgian Parliament dropped the law after protest rallies in downtown Tbilisi.⁷² Georgia seemed to secure its greatest victory on the path to European integration in December 2023 when the EU granted the country candidate status.⁷³

However, in 2024, the government reintroduced the "foreign influence law," which was adopted in early June.⁷⁴ This step has triggered a crisis in Georgia's relations with its Western partners. The US canceled military drills and suspended \$95 million in assistance to the Georgian government.⁷⁵ The EU downgraded its high-level contacts with Georgia⁷⁶ and announced that the country's accession process had been halted.⁷⁷

Simultaneously, the Georgian government sought to strengthen its relations with China by signing a strategic

partnership agreement in 2023 and granting a Chinese-led consortium the contract to construct the Anaklia port in 2024. The current government also increased its criticism of the West.⁷⁸

The upcoming parliamentary elections could be crucial for Georgia's relations with the West in this environment. If irregularities happen during the Parliamentary elections and the opposition rejects the results, and launches protests,⁷⁹ it could lead to the US and the EU refusing to recognize the election result. This scenario could bring Georgia–West relations to a point similar to that in Belarus after the August 2020 presidential elections. In such a case, Georgia might drift further toward China and Russia, reducing cutting ties with the West and ending more than 20 years of Georgia's Euro-Atlantic integration aspirations.

If the US and the EU criticize the elections but still recognize the results, they may try to maintain some presence in Georgia while taking additional steps, such as canceling the visa-free regime. On the other hand, if Georgian Dream loses power in the elections, it could restore relations between Georgia and the West, bringing them back to the

level seen in the mid-2000s, during Mikheil Saakashvili's presidency.

2.4 Azerbaijan after September 2023

Azerbaijan may have surprised many by taking control of the self-proclaimed Nagorno-Karabakh Republic, first during the 2020 Nagorno-Karabakh War and then during a military operation in September 2023. The “Liberation of Nagorno-Karabakh” was a cornerstone of Azerbaijan's domestic and foreign policy agenda throughout the post-Soviet period, and resolving the conflict on Azerbaijan's terms became a national priority for the country. After September 2023, Azerbaijan faces a new challenge: to formulate a new national idea, as articulated by President Ilham Aliyev during his campaign ahead of the February 2024 snap presidential elections.⁸⁰

While this new national idea may still take shape, there are signs that developing relations with the Turkic world, including Türkiye and the Central Asian Turkic countries, as well as the concept of “Western Azerbaijan,” will become top priorities for Azerbaijani foreign policy in the post-September 2023 era. In recent years, Azerbaijan has significantly increased its interactions

with Central Asian republics, including high-level visits and enhanced economic cooperation. The “Middle Corridor,” a route that could connect China to Europe via Kazakhstan and Azerbaijan, is one of the economic projects jointly promoted by Azerbaijan and Central Asian republics. Azerbaijan has also emphasized the Organization of Turkic States, established in 2021 as a replacement for the Cooperation Council of Turkic-speaking States, which had existed since 2009. President Aliyev has underscored Azerbaijan’s commitment to strengthening relations with Turkic states as a key foreign policy priority, notably during meetings with parliamentary officials from Türkiye, Kazakhstan, Uzbekistan, Kyrgyzstan, the Turkish Republic of Northern Cyprus, and Hungary.

Aliyev emphasized that the Turkic world has great power with its vast geography and potential—encompassing transportation routes, energy resources, human capital, and a growing population. He called for unified efforts to transform this potential into a global power.⁸¹

These themes were reiterated during the informal summit of the heads of state of the Organization of Turkic States, held in Azerbaijan in July 2024. Aliyev stated that enhancing

relations with Turkic countries and strengthening the Turkic world were Azerbaijan’s foreign policy priorities, noting that the Organization of Turkic States should become a prominent international force given its expansive geography and favorable demographic trends.⁸²

Central Asian countries have also started to pay more attention to their relations with Azerbaijan. On May 1, 2024, the energy ministries of Kazakhstan, Azerbaijan, and Uzbekistan signed a memorandum at the Tashkent International Investment Forum, marking a step toward interconnecting the energy grids of the three countries.⁸³

Thus, Azerbaijan is taking steps to connect Central Asia with the South Caucasus, potentially establishing a wider Caucasus–Caspian region and offering a new integration model as an alternative to those proposed by the EU and Russia. Additionally, Azerbaijan has increased its cooperation with the Global South, establishing a strategic partnership with China in July 2024⁸⁴ and officially applying to join the BRICS in August 2024⁸⁵.

The second pillar of Azerbaijan’s foreign policy strategy is the development of the concept of “Western

Azerbaijan,” which considers significant parts of Armenian territory to be historical Azerbaijani lands. The concept of “Western Azerbaijan” serves two main goals. The first is to maintain Armenia and Armenians as an external enemy for Azerbaijani society and thus rally the population around the ruling elite. The second goal is geopolitical—to create a “justification” for new attacks against Armenia.

These two visions, the creation of a united Turkic world and the concept of Western Azerbaijan, overlap. Azerbaijani leadership often argues that the Syunik region of Armenia, or as they call it “Zangezür,” was severed from the rest of Azerbaijan and handed over to Armenia by the Soviet government in 1920.⁸⁶ Thus, a potential attack against Syunik can be justified as a step to unite the Turkic world and to establish “Western Azerbaijan.”

Azerbaijani experts suggest that Azerbaijan is also positioning itself as a bridge between Central Asia and Europe. Azerbaijan remains keen to maintain its contacts with the US and the EU, viewing these relationships as essential pillars of its economic security. However, Azerbaijan is cautious, recognizing that this role could irritate Russia and

that neither the US nor the EU can provide physical security to Azerbaijan.

In the short to mid-term, Azerbaijan will likely remain the most powerful state in the South Caucasus based on economic, demographic, and military criteria, continuing to exert significant influence on regional geopolitics.

2.5 Armenia–Azerbaijan relations: Peace, stalemate, or war?

Armenia–Azerbaijan negotiations have experienced several ups and downs in recent years. Hopes for an imminent peace agreement have been followed by military escalations, as seen in September 2022, when Azerbaijan launched an incursion into Armenia, and in September 2023, when Azerbaijan took over the self-proclaimed Nagorno-Karabakh Republic by force. Since post-September 2023, Azerbaijan pushed for bilateral talks, with President Ilham Aliyev refusing to participate in the European Political Community summit in Granada in October 2023⁸⁷ and the Armenia–Azerbaijan–EU trilateral summit later the same month.

Bilateral negotiations gained momentum in December 2023 when Armenia and Azerbaijan signed a joint

statement,⁸⁸ resulting in the return of 32 Armenian prisoners of war and Armenia withdrawing from the contest to host the 2024 United Nations Climate Change Conference (COP29), making Baku the default destination. In the first half of 2024, Armenia and Azerbaijan continued negotiations, with leaders and foreign ministers meeting in Munich,⁸⁹ Berlin, and Alma-Aty in May 2024.⁹⁰ The US increased its involvement, seeking to expedite a peace agreement,⁹¹ and organized a foreign ministers' meeting in Washington during the NATO summit in July 2024 and another in September 2024 in New York.⁹²

In early 2024, Azerbaijan demanded that Armenia return four villages along the northern Armenia–Azerbaijan border. In April 2024, the two sides signed an agreement to begin the border delimitation and demarcation process in that area.⁹³ This process triggered protests in Armenia, which began in the Tavush region and reached Yerevan in early May 2024, led by Archbishop Bagrat Galstanyan.⁹⁴ The protests subsided after clashes between demonstrators and police near the Parliament building on June 12.⁹⁵

The sides confirmed the border delimitation and demarcation commission regulations on August 30,

2024.⁹⁶ However, prospects for progress in this area remain unclear, as Azerbaijan has stated that it will not withdraw its forces from the territories it controls following the 2021 and 2022 incursions into Armenia.⁹⁷ This position contradicts its reiterated statement of recognizing the Alma Ata Declaration as the principle determining demarcation and delimitation.

Hopes for a peace agreement by the end of 2024 began to fade as President Aliyev introduced new preconditions, primarily related to the Armenian constitution and the existence of the OSCE Minsk Group.

Aliyev points to the preamble of the Armenian constitution, which references the August 1990 Declaration of Independence, which itself mentions the December 1989 joint decision by the Soviet Armenian Supreme Council and the Nagorno-Karabakh National Council regarding the unification of Nagorno-Karabakh with Soviet Armenia. He claims that the Armenian constitution contains territorial claims against Azerbaijan, arguing that a peace agreement cannot be finalized without constitutional amendments.

Since early 2024, President Aliyev has repeatedly stressed the necessity of

amending the Armenian constitution as a precondition for peace.⁹⁸

Aliyev has also called for the elimination of the OSCE Minsk Group, stating in his June 2024 meeting with Turkic parliamentarians that Azerbaijan and Armenia should jointly request the OSCE to abolish the Minsk Group. He added that if Armenia preferred to maintain the Minsk Group, it would indicate continued territorial claims against Azerbaijan.⁹⁹

It is noteworthy that Prime Minister Nikol Pashinyan had advocated amending the Armenian constitution even before his rise to power during the 2018 Velvet Revolution. He established a special commission on constitutional reform in December 2019. Following interruptions due to the COVID-19 pandemic, the 2020 Nagorno-Karabakh War, and the June 2021 snap parliamentary elections, Pashinyan formed a new constitutional amendment council and specialized commission in early 2022. In December 2023, the council submitted its proposal for constitutional amendments to the government. Until 2024, there had been no publicly-reported discussions about removing the reference to the Declaration of Independence or drafting an entirely new constitution.

Pashinyan addressed the need for a new constitution on January 19, 2024. During an interview with Public Radio on February 1, 2024, he raised the issue of the Declaration of Independence in the constitution, “arguing that if Armenia’s state policy was based on the declaration, the country would never achieve peace and would instead have war.”¹⁰⁰ On May 24, 2024, Pashinyan ordered that the Constitutional Amendment Council approve the draft of the new constitution by December 30, 2026.¹⁰¹

Meanwhile, the Armenian Ministry of Foreign Affairs stated that the dissolution of the OSCE Minsk Group could be discussed in the context of a comprehensive settlement, primarily focusing on the conclusion of a peace treaty.¹⁰²

It can be assumed that the sides are currently discussing a framework agreement—a document of principles without detailed provisions. First, Armenia and Azerbaijan agreed to separate the issue of restoring communications from the peace agreement.¹⁰³ The border delimitation and demarcation processes are also on a separate track. However, even the signing of such a framework agreement remains in doubt. If Azerbaijan insists that an agreement is contingent on Ar-

menian constitutional changes, any peace deal is likely not possible before early 2024.

Armenian experts on the project believe that Azerbaijan's demands for constitutional changes and other preconditions serve as pretexts for Baku to delay signing any agreement with Armenia, leaving the possibility of further military escalation to open the "Zangezur Corridor" forcibly.

Azerbaijani experts interviewed during the project argue that constitutional changes are necessary to prevent future Armenian governments from attempting to reverse the losses incurred from 2020 to 2023. They believe that without these changes, the Armenian parliament or constitutional court might not ratify a peace agreement, as it could contradict the constitution, rendering the agreement ineffective.

Armenians and Azerbaijanis are likely to continue to live in a "no war, no peace" situation, with the constant risk of military escalation.

2.6 Abkhazia and South Ossetia/Tskhinvali region are stuck in the status quo

Since the 2008 Russia–Georgia War, no significant changes have occurred regarding the conflict.

Georgia and the international community, except for a few countries, view Abkhazia and South Ossetia as Georgian territories occupied by Russia. Meanwhile, Russia regards them as independent countries and allies, maintaining Russian military bases in both regions. The EU deployed a civilian mission in Georgia in October 2008, which remains active today.¹⁰⁴ The same month, the Geneva International Discussions were launched in Switzerland to address the consequences of the August 2008 war in Georgia. The decision to create this format was made under the August 12, 2008, ceasefire agreement. The format continues despite the ongoing Russia–Ukraine War, with the 61st round of the Geneva International Discussions held on June 25-26, 2024.¹⁰⁵

The incident prevention and response mechanism dealing with both the Ossetian and Abkhazian situations was established in February 2009 as a forum to address potential risks, follow up on incidents, exchange information, and discuss issues affecting local communities.¹⁰⁶ In late 2012, Russia and Georgia launched a new track of direct talks. Russia's Deputy Foreign Minister Grigory Karasin and Georgia's Special Representative for Relations with Russia Zurab Abashidze met on December 14, 2012, in Geneva.¹⁰⁷

The Georgian government made some steps to improve relations with Russia, including the restoration of direct flights in 2023,¹⁰⁸ but this did not impact the status quo in Abkhazia and South Ossetia/Tskhinvali region. Some discussions suggest that if Georgian Dream remains in power after the October 2024 parliamentary elections, negotiations between Russia and Georgia about resolving the Abkhazia and South Ossetia/Tskhinvali issues might begin, with a proposal to transform Georgia into a confederation, allowing Abkhazia and South Ossetia/Tskhinvali region to join.¹⁰⁹ However, Georgian experts interviewed during the project argue that this solution would be unacceptable to Georgian society, as it would perpetuate Russia's control over these two regions and enable Moscow to exert influence over Georgia's foreign and domestic policy through Abkhazia and South Ossetia/Tskhinvali. Experts also believe that Russia is unlikely to agree to any outcome that brings Abkhazia and South Ossetia/Tskhinvali under full Georgian control, whether as part of a unitary state or a federation.

Experts who took part in the project also mentioned that the deterioration of Georgia–West relations may affect the status quo. The EU may reduce its observer mission in Georgia, and Russia and Georgia could take steps to limit the role of the Geneva International Discussions. There are also concerns that if Georgian Dream loses power in the October 2024 parliamentary elections, Russia might provoke incidents along the administrative boundary lines in Abkhazia and South Ossetia/Tskhinvali region.

3. What is next for the South Caucasus?

The South Caucasus has faced severe internal and external shocks in recent years. The 2020 Nagorno-Karabakh War and Azerbaijan's military takeover of Nagorno-Karabakh in September 2023 have upended the regional status quo. The Russia-Ukraine War has been the major external shock, with ongoing geopolitical and geo-economic implications for the region. The South Caucasus in the near future may become an active arena for competition among great and middle powers, including Russia, the US, Iran, and Türkiye. At the same time, other actors, such as the EU, India, and China, have also become more involved in the region.

The struggle for connectivity is another key feature of the region's geopolitics, with different actors vying for control over various routes—such as the “Middle Corridor” and the International North-South Transport Corridor—or seeking influence over the same routes, as seen in the competition between Russia and the West to prevent one another's presence on the routes connecting Azerbaijan with the Nakhchivan Autonomous Republic and Türkiye via Armenia.

The region will continue to feel the effects of external developments, such as the Russia-Ukraine War and, more broadly, the Russia-West confrontation, tensions between Iran and Israel, the China-West rivalry, India's growing engagement, and the evolving interests of Iran and Türkiye. The outcomes of these processes are largely beyond the control of Armenia, Azerbaijan, and Georgia. Regional states can only aim to prepare for different scenarios. All of these developments are taking place within the broader framework of the global transition from a unipolar world to a new order. It is difficult to predict when and how this transition will end or what the main features of the new world order will be, but the process will likely continue for at least another decade. This means that until at least 2030, the South Caucasus is highly likely to be impacted by global power transitions and competition among great and middle powers.

While Armenia, Azerbaijan, and Georgia have limited capacity to shape these developments, this does not mean they have no agency or that nothing depends on them. In the worst-case scenario, the region could become fragmented, serving as a battleground for great and

middle powers, with no prospects for stability, development, or prosperity.

The best-case scenario envisions establishing a coherent region, with economic and political cooperation and the launch of regional institutions to foster this process. In this scenario, the South Caucasus would become a bridge between different powers in both economic and political terms, serving as a connecting point for the world and a platform of strategic convenience where officials and experts from various countries could meet to discuss key issues.

The prevailing view among experts from Armenia, Azerbaijan, and Georgia who participated in this project is that the region's states must do their best to avoid the worst-case scenario for the sake of their people. While they acknowledge that the best-case scenario may be unrealistic for the next decade, they argue that the three countries should focus on bringing the South Caucasus toward a middle-ground scenario, called the "baseline scenario."

The South Caucasus is not a coherent region in this baseline scenario, but countries are taking steps in that direction. These steps could include establishing joint working groups in-

volving mid-level civil servants, such as department heads, to address issues relevant to all three countries, such as the impacts of climate change, water management, and environmental degradation. Another step toward regional cohesion could be the launch of academic and think tank collaborations, such as joint online master's degree programs conferring joint degrees.

Creating a South Caucasus think tank network could also help bring the region closer together. This network could organize webinars and workshops on topics ranging from regional geopolitics to economic and social development. However, almost all experts agree that one prerequisite for this scenario to become a reality is the signature of an Armenia–Azerbaijan peace agreement. Even a framework document outlining the principles of relations between the two countries could pave the way for realizing the baseline scenario.

While these steps will not shield the region from external geopolitical rivalry or eliminate differences in foreign policy direction and domestic politics, they will bring the countries and their peoples closer together, potentially laying the groundwork for more substantial steps toward regional integration in the long term.

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About APRI Armenia and FNF Armenia

About APRI Armenia

The Applied Policy Research Institute of Armenia (APRI Armenia) is a nonpartisan think tank and policy accelerator focused on advancing regional stability, sustainable prosperity, and civic engagement. APRI Armenia's programs and initiatives are oriented toward concrete problemsolving, addressing key challenges for the near-term and long-term realization of Armenia's potential. Through its activities as a convenor and collaborator in strategic research, APRI Armenia facilitates breakthrough ideas and multistakeholder initiatives for positive change in the region.

The launch of APRI Armenia comes in response to a dire need for deep insight, dynamic policy dialogue, and clear understanding of Armenia in its geopolitical context. The organization is action-oriented, with a blend of long-term initiatives and near-term capacity building projects. We are creating a space to work on critical policy issues in a constructive and collaborative professional atmosphere.

About FNF Armenia

The Friedrich Naumann Foundation for Freedom (FNF) began its dialogue work in the South Caucasus in 1996 and has been implementing projects in Armenia since 2002. The FNF works as an innovation platform for liberal politics in more than 60 countries. Its work focuses on the freedom, responsibility, and dignity of every human being. The foundation supports the political, social, and economic institutions that make this possible: liberal democracy, the rule of law, the protection of human rights, and the social market economy.

In Armenia, FNF's work focuses on democratization and the protection of human rights. To this end, they offer political education activities to strengthen the participation of citizens. The foundation works with local partners to support them through cooperation. At the same time, the foundation promotes international dialogue and integrates Armenian interlocutors into liberal networks.

