

Armenia's Foreign Policy after the Second Nagorno-Karabakh War

Diversification in the Post-Unipolar World



April 2025



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Abbreviations

AZAL: Azerbaijan Airlines

BRI: Belt and Road Initiative

BRICS: An intergovernmental organization comprising ten countries—Brazil, Russia, India, China, South Africa, Egypt, Ethiopia, Indonesia, Iran, and the United Arab Emirates

CEPA: Comprehensive and Enhanced Partnership Agreement

CSTO: Collective Security Treaty Organization

EU: European Union

EAEU: Eurasian Economic Union

EUMA: European Union Mission in Armenia

GUAM: Georgia–Ukraine–Azerbaijan–Moldova

INSTC: International North–South Transport Corridor

KRG: Kurdistan Regional Government

NATO: North Atlantic Treaty Organization

OIC: Organization of Islamic Cooperation

OSCE: Organization for Security and Co-operation in Europe

OTS: Organization of Turkic States

UAE: United Arab Emirates

UNSC: United Nations Security Council

US: United States



About this Report

This report analyzes key developments in and around Armenian foreign policy from November 2020—the end of the Second Nagorno-Karabakh War—through March 2025. It argues that profound shifts in the geopolitical dynamics of the South Caucasus, driven by the Second Nagorno-Karabakh War and the onset of the Russia-Ukraine War, have shaped the Armenian government's pursuit of foreign policy diversification. The report examines Armenia's bilateral relations and offers recommendations to guide the overall trajectory of Armenian foreign policy, both broadly and at the level of specific bilateral relationships.

The report is based on extensive desk research and draws on a wide range of publications, official statements, and expert insights. Experts from APRI Armenia refined these findings through discussions at international conferences and workshops. In addition, more than 25 interviews were conducted with Armenian officials, as well as Armenian and foreign experts focusing on the region, including (names arranged alphabetically):

- Despina-Ivo Afentouli (Institute of International Relations, Greece)
- Tinatin Akhvediani (Centre for European Policy Studies, Belgium)
- Mustafa Aydın (International Relations Council, Turkey)
- Laurence Broers (Chatham House, United Kingdom)
- Attila Demkó (Mathias Corvinus Collegium, Hungary)
- Marie Dumoulin (European Council on Foreign Relations, France)
- Thomas de Waal (Carnegie Endowment for International Peace, United Kingdom)
- Richard Giragosian (Regional Studies Center, Armenia)
- Wojciech Górecki (Center for Eastern Studies, Poland)
- Alexander Iskandaryan (Caucasus Institute, Armenia)
- Vali Kaleji (Institute for Iran–Eurasia Studies, Iran)
- Armine Margaryan (Women and Global Security Architecture, Armenia)
- Stefan Meister (German Council on Foreign Relations, Germany)
- Eka Metreveli (Georgian Foundation for Strategic and International Studies, Georgia)
- Abhinav Pandya (Usanas Foundation, India)
- Marcel Röthig (FES South Caucasus, Germany)
- Eleonora Tafuro-Ambrosetti (Italian Institute for International Political Studies, Italy)
- Olesya Vartanyan (Independent expert, Georgia)

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Executive Summary

Foreign policy diversification fosters diplomatic, economic, and military relations with new partners while avoiding damage to existing relationships. It is considered prudent for states in regions whose countries have conflicting interests—such as the South Caucasus—and for countries facing security threats, such as Armenia. The need for diversification is further reinforced in an era of global transformation and the disruption of existing institutions and norms. For small states, in particular, diversification is likely to reduce the risks of entanglement in rivalries among major and regional powers.

The transformation of the global order—from a unipolar world to a more complex, multipolar era—is reshaping regions and nations alike, and the South Caucasus and Armenia are no exception. The onset of the Russia-Ukraine War, Azerbaijan's military takeover of Nagorno-Karabakh, its incursions into Armenia proper, and the continued promotion of concepts such as the so-called "Zangezur Corridor" and "Western Azerbaijan" have profoundly altered Armenia's security environment. The elevation of the Azerbaijan–Turkey relationship into a strategic alliance has further exacerbated regional tensions. At the same time, Armenia's evolving relations with Russia, France, the European Union, the United States, and India—alongside the emergence of a Russia–Azerbaijan strategic partnership—have refined Armenia's position.

After 2022, the Armenian government intensified its foreign policy diversification efforts in light of repeated incursions by Azerbaijan and in the absence of a tangible response from Russia and the Collective Security Treaty Organization. It sought to deepen diplomatic and military cooperation with new and existing partners, notably India, France, the EU, and the US, while opening multiple embassies worldwide. **We refer to this approach as “Western-focused diversification” to reflect Armenia's emerging engagement with Global South powers and especially its active dialogue with the EU and the US.** This orientation has been driven by the calculation that, due to the war in Ukraine, Russia has lost—and would continue to lose—its capacity to influence the South Caucasus significantly. It is also motivated by the belief that enhanced cooperation with the West provides a more effective tool for deterring further Azerbaijani aggression.

A core element of Armenia's current deterrence strategy is the pursuit of a “peace agenda,” in the prime minister's words, which entails normalizing relations with Turkey and Azerbaijan. In this context, the Armenian government recognized Nagorno-Karabakh as part of Azerbaijan at the Prague Summit of the European Political Community in October 2022 and accepted the post-September 2023 status quo.

The year 2024 did not bring a peace agreement, and the possibility of Armenia–Turkey normalization remains in doubt as Turkey continues to link normalization with the Armenia–Azerbaijan peace deal. Meanwhile, Russia has improved its military positions in Ukraine, and the US administration has entered active negotiations with Moscow over the conflict, making Russia's defeat a less likely outcome and increasing the chances of it reinforcing its influence in the South Caucasus.

In light of these shifts, the Armenian government began readjusting its engagement with Russia in the final months of 2024 to mitigate further deterioration of bilateral relations. In this context of strategic uncertainty and given the imperative of deterrence, Armenia must pursue a multifaceted foreign policy diversification strategy that balances its Western-focused orientation with greater efforts to deepen relations with non-Western states. Such an approach would enable Armenia to safeguard its sovereignty, navigate shifting power dynamics, and seize emerging opportunities while reducing the risk of antagonizing regional and global powers.



Deepening Diversification for Greater Deterrence: Recommendations

- **Strengthen deterrence through a dual-track engagement:** Advance Armenia's deterrence posture via a path of military modernization, fortified borders, and diplomatic outreach to key partners. This approach should raise the military, political, and economic costs of any potential Azerbaijani aggression. Increased engagement with powers that actively back or have a vested interest in maintaining stability and prosperity in the South Caucasus—such as Russia, Iran, the US, and the EU—would be particularly beneficial.
- **Engage Turkey:** Continue efforts toward normalization with Turkey while seeking to decouple this process from Armenia–Azerbaijan negotiations to weaken the Ankara–Baku alliance. Support from other actors, such as the US and the EU, in persuading Turkey to abandon conditionality would be an asset.
- **Strengthen economic ties across open borders:** Expand economic, energy, and infrastructure cooperation with Iran and strengthen economic relations with Georgia with the active involvement of Armenian businesses.
- **Reset relations with Russia:** As the character of the bilateral relationship evolves, Armenia should clearly articulate its vision for a new relationship with Moscow. At the same time, it must maintain open communication with its former top partner to ensure strategic transparency and reduce the risk of miscalculation.
- **Strengthen partnerships with the EU and the US:** Build on the momentum of the new EU–Armenia Partnership Agenda and the US–Armenia Strategic Partnership Charter. Reframe Armenia's international positioning to emphasize its aspirations as a stabilizing and convening force in the region.
- **Reinforce partnerships with the Global South, particularly on the economic front:** Build on the economic drive of emerging powers' diplomatic strategy to expand trade, attract investments in sectors such as emerging technologies and renewables, and develop multilateral cooperation formats to increase Armenia's economic and geopolitical options.



Transformation of the World Order

The collapse of the Soviet Union and the end of the Cold War ushered in a unipolar world, referred to by some experts as the “unipolar moment.”¹ This era was marked by the primacy of the US and optimism about the inevitable spread of liberal democracy and market economy.² The “third wave of democratization” in the late 20th century,³ together with the enlargement of the EU⁴ and the North Atlantic Treaty Organization⁵ in the early 21st century appeared to confirm these trends in international relations.

Since the mid-2000s, scholars and policymakers have debated the end of unipolarity and the transformation of the global order into a more complex era.⁶ China's growing economic power and Russia's criticism of the US-led international order—epitomized by President Vladimir Putin's speech at the 2007 Munich Security Conference—signaled impending changes in international relations.⁷ Geopolitical turbulences, including the Arab Spring, the 2014 Ukraine crisis, tensions over Taiwan, climate change, and widening economic and technological disparities, deepened rifts among international actors.

In 2017, the Trump administration introduced the concept of “great power competition” as a defining feature of geopolitics. This concept was formally incorporated into the December 2017 US National Security Strategy⁸ and National Defense Strategy,⁹ which identified Russia and China as revisionist powers and strategic competitors of the US.

The onset of the US–China trade war extended this competition into the economic domain,¹⁰ while the war in Ukraine, beginning in 2022, drove Russia–West relations to their lowest point since the height of the Cold War in the late 1950s and early 1960s.

The Biden administration subsequently framed the 21st century geopolitical landscape as a struggle between democracies and autocracies. This vision was articulated in the March 2021 Interim National Security Strategic Guidance¹¹ and the 2022 National Security Strategy.¹² Some analysts contend that an emerging coalition of non-Western states, led by Russia and China, is seeking to disrupt the US-led international order.¹³ The broader strategy includes reducing reliance on the US dollar in international trade and public reserves.¹⁴

Russia, China and other states have increasingly called for a multipolar world and distanced themselves from the West and Western-determined multilateral institutions.¹⁵ In the past decade, China has introduced several initiatives—including the Global Development Initiative, the Global Security Initiative, and the Global Civilization Initiative—aimed at shaping an alternative global framework. The expansion of organizations such as BRICS attests to the growing divide.¹⁶

The unipolar world is receding. In its place, a new international order is emerging—one marked by greater diffusion of power, unrelated and often uncoordinated global movements, intensified competition, and rising geopolitical conflict. Donald J. Trump's victory in the November 2024 US presidential election and the return of the “America First” policy will likely accelerate this transformation.



The South Caucasus, a Microcosm of the Emerging Multipolar World

The South Caucasus region—between Russia, Iran, and Turkey—lies along critical transit routes connecting Europe with Central Asia and China, and Russia with the Middle East and Southeast Asia. It has long been an arena of competition, dating back to antiquity, as various empires vied for influence and control. Following the collapse of the Soviet Union, the region opened to broader international engagement, attracting geopolitical interest from Turkey, Iran, the US, and later the EU through its Eastern Partnership initiative—as well as from Israel and, more recently, China.

Until the 2020 Nagorno-Karabakh War, two primary powers dominated the region: Russia, which maintained a strategic alliance with Armenia, including a military base and border troops, and Turkey, which sustained strategic partnerships with Azerbaijan and Georgia.¹⁷ The US supported this trilateral cooperation, viewing it as a mechanism of constraining Russian influence.¹⁸ In parallel, the GUAM organization—Georgia, Ukraine, Azerbaijan, and Moldova—was established in 1997 and renamed the Organization for Democracy and Economic Development–GUAM in 2006. It emerged as a regional grouping to foster cooperation and to counterbalance Moscow's reach.¹⁹

The 2020 Nagorno-Karabakh War,²⁰ the onset of the Russia-Ukraine War in 2022, and Azerbaijan's military takeover of Nagorno-Karabakh in 2023 disrupted the regional status quo. Russia's preoccupation with Ukraine diminished its ability to shape developments in the South Caucasus. Turkey, having provided significant support to Azerbaijan before and during the 2020 Nagorno-Karabakh War, saw its influence with Baku increase.²¹

After Russia and the Collective Security Treaty Organization failed to respond meaningfully to Azerbaijan's incursion into Armenia in September 2022,²² Yerevan began diversifying its foreign policy—bringing historically less-involved powers, such as India, into the regional equation.

The US and the EU increased their regional engagement, too, by facilitating Armenia–Azerbaijan negotiations through the Brussels and Washington platforms. In December 2023²³ the EU granted Georgia candidate status for membership, only to suspend the accession process in June 2024 in response to Georgia's adoption of the Law on Transparency of Foreign Influence.²⁴ Azerbaijan, meanwhile, has expanded its strategic partnership with Israel in sensitive sectors, including energy, military procurement, and cybersecurity. In addition, Azerbaijan, Turkey, and Pakistan have also launched a strategic partnership,²⁵ further strengthening trilateral military ties.²⁶

China has also increased its regional presence²⁷, signing strategic partnership agreements with Georgia in 2023²⁸ and Azerbaijan in 2024.²⁹ It has simultaneously expanded its soft-power outreach, launching direct flights between China and Armenia in September 2024, fostering people-to-people connections.³⁰

With divergent and overlapping interests among the US, Russia, the EU and its member states, Turkey, Iran, Israel, China, and India, the South Caucasus stands as a microcosm of the emerging multipolar world order—one that adds layers of complexity and uncertainty for Armenia, Azerbaijan, and Georgia alike.



2021–2024: The Rollercoaster of Regional Geopolitics and the Start of Armenia's Foreign Policy Diversification

The year 2020 was a challenging one for the entire world, but few countries faced challenges as acute as Armenia. While grappling with the socioeconomic effects of the COVID-19 pandemic, Armenia confronted a large-scale military offensive launched by Azerbaijan against the self-proclaimed Nagorno-Karabakh Republic on September 27, 2020.³¹ The 44-day war ended with the Armenians' defeat and the November 10, 2020, trilateral statement.³²

The statement, brokered by Russia, included provisions for the withdrawal of Armenian forces from territories surrounding the former Nagorno-Karabakh Autonomous Oblast, the deployment of Russian peacekeepers for an initial five-year term, and the establishment of the Lachin Corridor to connect Armenia with Nagorno-Karabakh.³³

In the aftermath of the war, Armenia entered a period of intense domestic political turmoil, culminating in snap parliamentary elections in June 2021. The vote resulted in Prime Minister Nikol Pashinyan's reelection.³⁴ A detailed chronology of events from January 2021 to January 2025 can be found in the Appendix.

2021: Limited Shifts in Armenia's Traditional Foreign Policy

In 2021, Azerbaijan launched a campaign of military pressure against Armenia, carrying out incursions in May³⁵ and November³⁶ and occupying portions of Armenian territory. Armenia maintained its "Russia-focused" foreign policy in this challenging and evolving environment.

Prime Minister Nikol Pashinyan participated in two summits on Armenia–Azerbaijan relations convened by Russian President Vladimir Putin in January³⁷ and November 2021,³⁸ alongside Azerbaijani President Ilham Aliyev. A trilateral working group co-chaired by the deputy prime ministers of Armenia, Russia, and Azerbaijan was established through the January 11, 2021, statement to focus on restoring regional communications. In August 2021, Armenia signed a new contract with Russia to procure additional Russian arms.³⁹ Meanwhile, the EU started its mediation efforts in December 2021, organizing a meeting between Nikol Pashinyan and Ilham Aliyev in Brussels facilitated by President of the European Council Charles Michel.⁴⁰

2022: A Pivotal Year for the Region and for Armenia

The regional balance of power began shifting again after the onset of the Russia-Ukraine War in February 2022. Russia's failure to achieve a swift victory in Ukraine and the withdrawal of Russian troops from the outskirts of Kyiv in April made it clear that the conflict would devolve into a grinding war of attrition. This development required Russia to divert significant military, human, and administrative resources to Ukraine, reducing its ability to maintain involvement and presence in other areas, including the South Caucasus.

Azerbaijan quickly exploited the shifting regional dynamics by launching an incursion in March into the Nagorno-Karabakh village of Parukh, whose security was Russian peacekeepers' responsibility.⁴¹ This was followed by new attacks against Nagorno-Karabakh in August, forcing authorities to evacuate several Armenian settlements along the Lachin Corridor and agree to use a new road connecting Armenia with Nagorno-Karabakh.⁴² In those circumstances, Russia offered to postpone the finalization of the status of Nagorno-Karabakh.⁴³ Armenia agreed to Russia's draft proposal in August 2022,⁴⁴ but this option was rejected by Azerbaijan.⁴⁵ Parallel to this, the EU intensified its facilitation efforts, with three meetings in April,⁴⁶ May,⁴⁷ and August.⁴⁸



In September, Azerbaijan launched an offensive against Armenia⁴⁹ that resulted in the occupation of additional Armenian territories and many fatalities. While the incursion was condemned by the EU, France, and the US, Russia remained quiet. In December, Azerbaijan imposed a land blockade on Nagorno-Karabakh, cutting local Armenians off from daily supplies for 10 months.⁵⁰ This human rights tragedy was also a blow to Russia's image as it showed its failure to keep the Lachin Corridor open,⁵¹ and indicated possible changes in the regional order in favor of Turkey.

Following Azerbaijan's aggression in September, Armenia found itself in a precarious position. It became evident that neither Russia nor the CSTO could fulfill their obligations under the bilateral Armenia–Russia treaty of 1997 or the collective security guarantees within the CSTO. After its defeat in the 2020 Nagorno-Karabakh War, the military balance between Armenia and Azerbaijan shifted decisively in favor of Baku. Moreover, Russia failed to deliver the weapons promised to Armenia under the August 2021 agreement.⁵² In response to these challenges, the Armenian government signed the Prague Declaration in October during the inaugural summit of the European Political Community.⁵³

The Prague Declaration of October 2022

During the inaugural Prague Summit of the European Political Community in October 2022, Armenia and Azerbaijan asserted their commitment to the Charter of the United Nations and the Alma Ata 1991 Declaration, under which they recognized each other's territorial integrity and sovereignty within the Soviet administrative borders. Thus, by signing the Prague Declaration, Armenia recognized Nagorno-Karabakh as part of Azerbaijan, a movement away from Yerevan's traditional position that it would leave the enclave's legal status unaddressed until the final settlement of the conflict.

The Armenian government's calculation at that time was that this move would possibly deter further attacks by Azerbaijan and that they would meanwhile bank on the presence of Russian peacekeepers for the safety of the Armenian population of Nagorno-Karabakh. It also hoped that the US and the EU would put pressure on Azerbaijan to agree on international mechanisms ensuring their safe long-term presence.

Armenia's actual foreign policy diversification began in September 2022. This shift was also signaled by its decision to reject the CSTO offer to deploy a mission along the Armenia–Azerbaijan border.⁵⁴ Instead, Yerevan applied to the EU to send observers, likely inspired by the EU's Monitoring Mission in Georgia. EU observers arrived in Armenia in October 2022 for an initial two-month mission, which was extended to a two-year deployment in February 2023.⁵⁵

2023–2024: Armenia's Western-Focused Diversification in Action

Armenia's foreign policy diversification advanced drastically in 2023 and 2024, particularly emphasizing strengthening relations with the EU and the US. Armenia participated in three trilateral meetings facilitated by the EU in 2023.⁵⁶ It also accepted the US offer to establish a negotiation track immediately after the September 2022 incursion by Azerbaijan into Armenia. All this occurred while Russia's mediation efforts were on the wane, with Armenia refusing to participate. Armenia entered active talks on a new EU–Armenia Partnership Agenda high-level document, saw its request to access EU's non-lethal support through the European Peace Facility accepted,⁵⁷ embarked on visa liberalization dialogue⁵⁸ and finally, held talks for a US–Armenia strategic partnership in summer 2024.⁵⁹



ARMENIA'S FOREIGN POLICY AFTER THE SECOND KARABAKH WAR

While Western partners have been a clear focus for Armenian diplomacy, Yerevan also actively engaged with other powers. Armenia signed a declaration on strategic partnership with Georgia in January 2024,⁶⁰ established diplomatic relations with Saudi Arabia,⁶¹ and opened several embassies in 2024 to activate its bilateral relations. Prime Minister Nikol Pashinyan participated in the BRICS summit held in Russia in October 2024 for the first time.⁶² In 2023 and 2024, Armenia continued to expand its defense cooperation with India and signed contracts to procure weapons from France.⁶³ The country also continues peacekeeping military drills with the US.⁶⁴

Over the years, the geopolitics of the South Caucasus have increasingly taken a geoeconomic turn, with competition focused on being involved in international trade or infrastructure projects or ensuring that others are excluded from them. The intertwining of geopolitics and geoeconomics has only strengthened with the ongoing global shifts. A more detailed investigation of the competing and overlapping geoeconomic projects is necessary to clarify the likely future dynamics of Armenia's foreign policy priorities.



Geopolitical and Geoeconomic Corridors

Transit corridors, a potential issue that resurfaced following the war in Ukraine, have been a central point of contention in the South Caucasus, and the outcome may determine its future geopolitical configuration

The South Caucasus, a Crossroad of Trade Routes and Concepts.

	Description	Countries Involved	Key Considerations	Obstacles [to its Completion]
The Middle Corridor	An alternative route connecting China with Europe bypassing Russia and Iran	China, Kazakhstan, Azerbaijan, Georgia, and Turkey	According to the World Bank, the benefit is to boost regional trade among participating countries	Regional instability Lack of infrastructure and investor interest
Azerbaijan's "Zangezur Corridor"	A land route in Armenia that connects Azerbaijan to Turkey with no Armenian controls of Azerbaijani citizens and goods	Azerbaijan, Turkey	More of a geopolitical push than one with an economic rationale because of the Aras Corridor	Violates international principle of territorial integrity and international trade practices
The International North-South Transport Corridor	Connects India with Russia and Europe via Iran, Central Asia, and the South Caucasus	India, Russia, and Iran	Sanctions on Iran and Russia and the war in Ukraine have shifted the trajectory toward a more South-to-North trade configuration	Sanctions Instability
Armenia's Crossroads of Peace	Armenia's vision of regional connectivity	Armenia, Georgia, Azerbaijan, Iran, Turkey	Reopening all regional communications, enabling Azerbaijan to access Turkey through Armenia, and allowing Iran to reach Georgia, the Black Sea, and Russia via Armenia	Azerbaijan's demand to establish the "Zangezur Corridor" Absence of a feasibility study



The Middle Corridor

China, Kazakhstan, Azerbaijan, Georgia, and Turkey have promoted the Middle Corridor as an alternative route connecting China with Europe while bypassing Russia and Iran. Talks about this Corridor began alongside the construction of the Baku–Tbilisi–Kars railway and gained increased attention after February 2022, when 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, providing recommendations on tripling freight volume and halving travel time by 2030.⁶⁵ Notably, the report emphasized that the primary benefit of the Middle Corridor would be the boost to regional trade among participating countries rather than serving solely as a conduit for China–Europe trade. Separately, the US has advocated for another version of the route to connect Central Asian countries to Europe, bypassing Russia and cutting China out of the project, thereby diminishing their regional influence.⁶⁶

Azerbaijan's "Zangezur Corridor"

Following the 2020 Nagorno-Karabakh War, Azerbaijan began pushing for the so-called "Zangezur Corridor," a land route in Armenia that could pass via the Vayots Dzor or Syunik regions—which connects Azerbaijan with the Nakhichevan Autonomous Republic and Turkey. Azerbaijan has argued that there should be no controls for Azerbaijani citizens or goods traveling between Azerbaijan and Nakhichevan.⁶⁷ It has framed the "Zangezur Corridor" as a vital segment of the Middle Corridor, seeking to secure the support of countries involved in that project.⁶⁸ However, the "Zangezur Corridor" is more a geopolitical initiative than an economic one, as Azerbaijan has access to Nakhichevan via Iran and the two countries agreed to establish the Aras Corridor to facilitate the access.⁶⁹ Azerbaijan and Turkey aim to use the "Zangezur Corridor" to increase their influence in the South Caucasus under the guise of regional economic cooperation. In recent years, President Aliyev has emphasized the need to unite the Turkic world, from Turkey to Kazakhstan, stating that the decision of the Soviet government to separate Western Zangezur from Azerbaijan and transfer it to Armenia led to the geographical division of the Turkic world.⁷⁰

The International North–South Transport Corridor

In 2000, India, Russia, and Iran signed a memorandum establishing the INSTC to connect India with Europe via Iran, the South Caucasus, and Russia. However, international sanctions on Iran hindered the development of the project. After February 2022, interest in linking Russia and India grew as Russia sought to redirect its trade routes from the West to the East. In 2023, Russia and Iran signed an agreement to complete the railway network, creating a unified system stretching from Iranian Persian Gulf ports to Russia via Azerbaijan.⁷¹ The direct connection between Russia and Iran via the Caspian Sea and the route via Turkmenistan and Kazakhstan are also under discussion. Iran also proposed the "Persian Gulf–Black Sea" corridor project, which aims to connect Iran to Europe via Armenia, Georgia, and the Black Sea.⁷²

Armenia's Crossroads of Peace

The Armenian government presented its regional connectivity vision, the "Crossroads of Peace" project, in October 2023 at the Silk Road Forum in Tbilisi.⁷³ This plan involves reopening all regional communications, enabling Azerbaijan to access Turkey through Armenia, and allowing Iran to reach Georgia, the Black Sea, and Russia via Armenia. The project envisages the sovereignty of states over the routes passing through their territory. To support this vision, the Armenian government has begun improving logistics in its southern Syunik Province, which borders Iran. However, these projects will require significant time to implement.⁷⁴



Armenian Foreign Policy: Key Directions

Armenia–Azerbaijan Relations: What Next?

Relations with Azerbaijan are perhaps the most important for Armenia. Conflict with Azerbaijan, which goes back 34 years, significantly escalated in recent years, as Azerbaijan used military force to destroy the self-proclaimed Nagorno-Karabakh Republic, force the Armenian population out, and occupy around 200 square kilometers of Armenian territory. The concepts of “Western Azerbaijan” and the “Zangezur Corridor” promoted by Azerbaijan are direct threats to Armenian territorial integrity and sovereignty, and their realization would significantly weaken Armenia’s statehood. Almost all the experts interviewed for the project argued that managing relations with Azerbaijan will be the key challenge for Armenia’s foreign policy in the coming years, casting doubts on the likelihood that the peace agreement will be signed and expressing concerns that Azerbaijan may use force to achieve political gains again.

Armenia and Azerbaijan entered 2025 without any agreement, and given the latter’s preconditions, an agreement is not likely to be signed this year. The military balance favors Azerbaijan, and despite the finalization of the draft of the peace agreement in March 2025⁷⁵ Armenia continues to face the risk of invasion or threat of it by Azerbaijan.⁷⁶

The main reason behind Azerbaijan’s escalation would be to force the opening of the so-called “Zangezur Corridor,” which would liberate “historical Azerbaijani lands” within the concept of “Western Azerbaijan” or facilitate the connection between Turkey and Central Asia via Azerbaijan for the unification of the Turkic world.

Baku could escalate for domestic political reasons, too. The overarching priority for Azerbaijan’s leadership is the survival in perpetuity of family rule, to which all other considerations are subordinate, and here, the role of Armenia as “a useful enemy” is exploited.⁷⁷

Azerbaijan might also seek to escalate in order to strengthen its position along the now-exposed Armenia–Azerbaijan border, gain greater fire control over Armenia’s strategic infrastructure following its occupation of strategic heights, or deter investment in Armenia’s border regions. Azerbaijan continues to pursue the strategy of isolating Armenia from regional projects, such as the Black Sea submarine cable.⁷⁸

Armenia’s primary goal in this environment should be to prevent potential escalations by Azerbaijan. This can be done by increasing the military, diplomatic, and economic costs of Azerbaijan’s new aggression and continuing diplomatic engagement with Baku.

Recommendations

- Armenia should continue to negotiate with Azerbaijan and to communicate with external players about its readiness to sign the agreed text of the peace agreement.
- Armenia should continue to carry out army reforms and modernization, to purchase military equipment, and to build fortified units along the Armenia–Azerbaijan border.



Armenia–Turkey Relations: Is Normalization Possible?

Since Armenia gained independence from the Soviet Union in 1991, normalizing relations with Turkey has been among the country's top foreign policy priorities. The rationale behind this has been both economic, to end the blockade and facilitate access to Turkish Mediterranean ports, and political, to drive a wedge in the Azerbaijan–Turkey partnership. Normalizing relations with Turkey is an important part of foreign policy diversification, which would allow Armenia to decrease its dependence on Russia. Another motive is the wish to use Turkey either to push Azerbaijan to sign a peace agreement with Armenia or at least to stop Azerbaijan from launching a new large-scale attack.

The engagement intensified in January 2022 when special representatives met in Moscow.⁷⁹ Prime Minister Pashinyan has held several meetings with President Erdoğan, the last in September 2024 in New York. Armenia and Turkey have reached several agreements, including opening borders for third-country citizens and launching direct cargo flights, but they have not been implemented yet.

Most experts interviewed for the project emphasized the significance of Armenia–Turkey normalization for Armenia's stability and security and argued that despite the lack of meaningful progress in the last three years, Yerevan should continue its engagement with Ankara.

Recommendations

- Share the message with Turkey that the window of opportunity for normalizing relations with Armenia will not last forever, and its absence may prevent Turkey from further increasing its influence in the South Caucasus.
- Propose that Armenia–Turkey relations be discussed in contacts between Brussels, Washington, and Ankara.

Armenia–Georgia Relations: Know Thy Neighbor

Relations with Georgia are of utmost importance for Armenia, as their shared border is one of only two open Armenian borders and the country provides vital routes connecting to parts of the outside world. These routes grant Armenia access to Russia, the Black Sea, and Europe. While Armenia and Georgia have enjoyed friendly relations since gaining independence in 1991, their relationship has lacked strategic depth—in contrast to Georgia's strategic partnership with Azerbaijan, for the two countries signed a declaration on deepening strategic cooperation in 1997,⁸⁰ and the trilateral Turkey–Azerbaijan–Georgia partnership institutionalized by the 2012 Trabzon Declaration. Georgia's strained relations with Russia have further contributed to its outreach to Turkey. Tbilisi has also sought to balance Moscow's influence by pursuing a policy of Euro-Atlantic integration, making membership of the EU and NATO a cornerstone of its foreign policy.

The diversification of foreign policy in Armenia significantly changed Armenia's policy toward Georgia. Deepening relations with the EU and the US reinforced Georgia as Armenia's important gateway to the West. According to interviews, Georgia's experience on its path toward Euro-Atlantic integration was perceived as a useful guideline for Armenia. Armenia also viewed Georgia as a strategic convening place for discussion with Turkey and Azerbaijan.⁸¹

Armenia pursued a policy of deepening relations, and the Armenia–Georgia Strategic Partnership Statement signed in January 2024⁸² was the primary achievement of that policy.

However, the worsening of Georgia–West relations in 2024 has added a layer of complication to Armenia's quest to intensify its engagement with the West. Armenia finds itself in a region where no other state is interested in an increased Western presence.



Georgia's stability, security, and prosperity—and the development of a strategic partnership with the country—remain important for Armenia, regardless of Georgia's domestic political developments. This principle has been and continues to serve as the main leitmotif of Armenia's policy toward Georgia. Experts interviewed for the project also emphasized the importance of Armenia fostering relations with Georgia, while some argued that Armenia may be a facilitator between Georgia and the EU.

Recommendations

- Armenia should build on the strategic partnership to deepen bilateral relations. Think tanks and other civil society organizations should support these efforts by recommending areas of reinforced partnership between the two countries, particularly around economic policy and infrastructure projects.
- Armenia should highlight the importance of maintaining constructive engagement with Georgia for its Western partners. Isolating Georgia could undermine Western regional interests and restrict Armenia's capacity to pursue a diversified foreign policy.
- Armenia should complete the construction of a high-voltage electricity line to the Georgian border. This will facilitate the launch of the North–South energy corridor as envisaged by the 2016 multilateral roadmap.

Armenia–Iran Relations: From Friendship to Partnership?

Since gaining independence in 1991, Armenia has developed friendly relations with Iran. Along with Georgia, Iran serves as one of Armenia's two open borders and is therefore of major significance for Armenia's openness to the world and the Global South in particular. Launching the Armenia–Iran gas pipeline in 2007⁸³ and the “gas for electricity” swap scheme added an important economic dimension to the relationship.

The EAEU–Iran free trade agreement of December 2023⁸⁴ may also strengthen Armenia's economy as only Armenia among EAEU member countries has a land border with Iran. Transport corridor projects such as the “Persian Gulf–Black Sea” corridor could transform Armenia into a key transit country connecting Iran and India with Europe. These projects would also undermine Azerbaijan's and Turkey's efforts to isolate Armenia, making relations with Iran even more critical for Armenia.

As Armenia started its foreign policy diversification, relations with Iran were among Yerevan's top priorities. While developing relations with the US and the EU, Armenia's position has been clear: Yerevan will not be involved in any action against the Islamic Republic of Iran.⁸⁵

Engagement with Iran has been one of the key components of deterrence against Azerbaijan in 2024. Iran's objection to the so-called “Zangezur Corridor” is strategic and geopolitical. It would cut Tehran from its land connection with Armenia and the EAEU market, further diminishing Iran's significance in the region. However, one cannot expect that this opposition would necessarily translate into tangible action to prevent the opening of the “Corridor” by Azerbaijani forces, given Iran's recent setbacks and overstretched resources. Notwithstanding Iranian officials' multiple statements on the matter, Armenia should be prepared for a scenario under which Iran may, in the end, not be able to prevent the opening of the “Corridor.”

Another factor influencing Armenia–Iran relations is the ongoing tension between Israel, the West, and Iran, which was exacerbated by Iranian support for Russia during the war in Ukraine. Donald Trump's announced “maximum pressure” approach against Iran could negatively affect Armenia–Iran relations while the US–Iran deal may create new opportunities for Armenia.



Recommendations

- The Armenian government should intensify economic cooperation with Iran, considering the two countries' strategic location as gateways to the EAEU market and India. Limiting factors, such as the sanctions regime and actual capacities, should also be considered.
- Armenia should continue to facilitate Iranian companies' participation in infrastructure projects, as exemplified by the start of construction work on the Kajaran–Agarak highway.
- Armenia should assess the potential for using Iran's Chabahar port for export and import operations.

Armenia–Russia Relations: The Need for a Reset

Notwithstanding the war in Ukraine and the strained relations between Yerevan and Moscow, Russia is highly likely to remain a driver of geopolitical dynamics in the South Caucasus. The depth, width, and scope of relations built in the last 34 years have given Russia significant leverage on Armenia, including Armenia's membership in the CSTO and EAEU. Over the past four years, relations between Armenia and Russia have changed significantly, transforming Moscow from a strategic ally into a problematic partner. Both sides now harbor a lengthy list of grievances against each other.

According to the Armenian government, Russia failed to fulfill its obligations under the 1997 bilateral agreement to protect Armenia during Azerbaijan's incursions into Armenian territory in 2021 and 2022. Furthermore, Russia did not prevent Azerbaijan's military takeover of Nagorno-Karabakh in September 2023.⁸⁶ Another major point of contention is Russia's insistence on implementing Article 9 of the November 10, 2020, trilateral statement, while the remainder has been void given Azerbaijan's and Russia's noncompliance with it.

On the other hand, Russia accuses Armenia of pivoting toward the West by deepening cooperation with the EU and the US,⁸⁷ inviting EU observers to Armenia,⁸⁸ while freezing its membership of and openly criticizing the CSTO.⁸⁹

Armenia has also drastically reduced its military-technical cooperation with Russia. Armenia sourced more than 90% of its weapons from Russia a few years ago. As of early 2025, that figure has dropped to below 10%, with India and France emerging as Armenia's primary partners in defense cooperation.

Despite political tensions, bilateral economic ties are flourishing. In 2024, trade turnover reached \$12.401 billion.⁹⁰ Russia remains a key destination for a significant portion of Armenia's exports and is the primary source of several strategic imports, including wheat.⁹¹ The growing economic relations give Russia additional opportunities to use them as leverage against Armenia if Russia deems this appropriate.

Recent developments have also profoundly impacted the Armenian public's perceptions of Russia. While an overwhelming majority of Armenians viewed Russia as a friendly nation in 2018, that figure has now dropped sharply, as illustrated by the last International Republican Institute poll.⁹²

The current uncertainty around Armenia–Russia relations may pose significant challenges. Nearly all experts interviewed for the report argued that in the short to midterm, Russia will likely remain one of the key external powers in the South Caucasus, with considerable leverage to influence the region's geopolitics, and Armenia should consider this fact.



In recent years, there has been a marked increase in Russia–Azerbaijan cooperation, solidified by the February 2022 statement of strategic interaction.⁹³ Russian President Vladimir Putin's state visit to Azerbaijan in August 2024 was a prominent demonstration of this high-level partnership.⁹⁴ Russia and Azerbaijan share a vision in which regional powers manage regional conflicts, and both support the 3+3 regional cooperation format.⁹⁵

In the current environment, Russia may decide it can pursue its interests in the South Caucasus through a strategic partnership with Azerbaijan, despite recent tensions caused by the tragic December 2024 incident with the AZAL Baku–Grozni flight.⁹⁶ Azerbaijan may actively encourage this perception among Russian leaders through various ways, including funding Russian experts and academic circles to portray Armenia as an adversary of Russia while presenting Azerbaijan as a friendly nation. This risks further straining the bilateral relationship. This risk can also increase should the “understanding about Ukraine” between Russia and the US under the new Trump administration occur, as over the medium term, Russia would then gain greater capacity to shape regional geopolitics.

In such a scenario, Moscow would likely redirect resources to the post-Soviet space, including the South Caucasus, and could diminish US efforts to curb Russian influence in the region, a key factor behind the previous Biden administration's engagement.

Recommendations

- Armenia should map its and Russia's core interests in the South Caucasus to understand where these interests overlap and where they do not.
- Armenia should continue communicating the key goals of its foreign policy strategy.
- Armenia should take steps to resume an Armenia–Russia expert dialogue, which started in Spring 2022, to better articulate Armenia's position among Russian expert circles and counterbalance Azerbaijan's narratives.

Armenia–EU Relations: Building Momentum

The EU has been Armenia's most important diplomatic partner in 2024, and the relationship has transformed the most over the last decade. This peak comes in the wake of the successive acts of aggression by Azerbaijan against Armenia and the Armenians of Nagorno-Karabakh, with a general focus on supporting Armenia's resilience.⁹⁷

This transformation is felt through the many unprecedented areas in which Armenia and the EU have been engaging over the past few years, namely security with EUMA and access to the European Peace Facility; visas, with the launch of visa liberalization negotiations; and other economic and institutional areas under development. The new EU–Armenia Partnership Agenda, complementing the bilateral CEPA, is expected to be announced this year.

Building on this positive momentum, Armenian political forces, including the ruling party, have declared that Armenia should embark upon the process of Armenia's accession to the EU, with a bill passed in the Armenian National Assembly.⁹⁸ Experts interviewed for the project emphasized that the momentum in Armenia–EU relations was the most significant achievement of Armenia's foreign policy after the second Nagorno-Karabakh War, and Armenia should continue efforts to foster relations.



However positive the momentum has been, and even when real progress in deepening the bilateral relationship has been made, the lack of cohesive regional vision by the EU and the Armenian government's ambiguous position on its future in the EAEU and in a region with no EU borders cannot be ignored. The lack of a cohesive approach to the South Caucasus, which we underlined in our 2024 report, has been recognized by the European Commission itself. Its President Ursula von der Leyen in her mission letter to the Commissioner-Designate for Enlargement Marta Kos, instructed her to “develop a coordinated approach to supporting the countries of the Southern Caucasus.”⁹⁹ It is also not clear how Armenia will reconcile the inherent issues surrounding its membership of the EAEU and the growing distance between the EU, Georgia, and Turkey. These two neighbors being difficult candidates for EU accession.

In addition, the EU's handling of regional geopolitical events has exposed the limits of its engagement. Despite facilitating negotiations between Armenia and Azerbaijan in 2022–2023, the EU failed to prevent Azerbaijan from using force in Nagorno-Karabakh in September 2023. Moreover, a lack of policy unity among the 27 EU member states hindered the provision of adequate support to Armenia in the aftermath.¹⁰⁰

Given this complex and uncertain situation, the best approach is to build on the positive momentum to reinforce engagement in areas where the EU is strong.

Recommendations

- The Armenian government should prioritize the full implementation of the EU–Armenia CEPA as a key tool for deepening cooperation with the EU. The ultimate deadline for achieving this goal should be 2029, marking the end of the current EU leadership's tenure.
- The Armenian government should also set 2029 as the deadline for completing all the necessary reforms required for visa liberalization with the EU.
- Armenia should prepare detailed proposals for the new EU resilience and growth plan to cover the period after 2027. Three primary areas, building on the EU's strength, could be emphasized:
 - Infrastructure development, with a focus on the Syunik and Vayots Dzor regions
 - Public administration reform
 - Economic diversification
- Armenia should consistently raise the issues of Armenian prisoners of war held in Azerbaijan and the destruction of Armenian Christian heritage in Nagorno-Karabakh and surrounding areas during its interactions with the EU. Armenia should call on the EU to address these concerns with Azerbaijan.
- Armenia should continue to develop its relations with EU member countries engaged in the region economically or politically, such as France, Poland, Hungary, Italy, and Germany, and/or develop group partnerships with individual EU member states.

Armenia–France Relations: Emerging Defense Partner

Relations with France have always been important for Armenia. They have their roots in the history of the pro-Armenian movement in France in the late 19th and early 20th centuries and the large Armenian Diaspora.

Armenia–France relations gained new momentum after the September 2022 Azerbaijani aggression against Armenia. France initiated discussions on the Armenia–Azerbaijan situation in the UNSC¹⁰¹ and supported the deployment of the EU Observer Mission in Armenia to monitor the Armenia–Azerbaijan border.



As Armenia launched its foreign policy diversification program, focusing on relations with the US and the EU, France emerged as a key Armenian partner in the EU. The years 2023–2024 marked the start of defense cooperation between Armenia and France.

In October 2023, Armenia and France signed deals on defense cooperation, including a contract for the purchase of Thales-made radar systems.¹⁰² On a visit to Yerevan in February 2024, French Defense Minister Sébastien Lecornu expressed France's readiness to sell more long-range systems to Armenia and announced that a French military adviser specializing in air defense would be deployed in Armenia.¹⁰³ In June 2024, Armenia and France reached an agreement for the sale of Caesar self-propelled howitzers.¹⁰⁴ France moved away from its position after November 10, 2020, because it was marginalized by the Turkish–Russian tandem. As co-chair of the OSCE Minsk Group, France seeks to maintain a regional power balance.

Meanwhile, bilateral economic relations are far behind political and defense cooperation. Besides Crédit Agricole, Amundi, Pernod Ricard, and Veolia, no big French companies operate in Armenia. Bilateral trade between the two countries declined around 11% in 2024 compared to 2023, reaching \$158 million.

Recommendations

- Armenia should continue to expand defense cooperation with France, including modernizing the Armenian Armed Forces' combat-preparedness.
- Armenia should reinforce the presence of French companies in the Armenian market and tap into their knowledge and expertise to gradually bring Armenian businesses closer to EU standards as a step toward economic diversification.

Armenia–US Relations: Navigating Trump 2.0

Armenia–US relations have been developing since Armenia gained independence in 1991, with the OSCE Minsk Group, the US Armenian Diaspora, and the recognition of the Armenian Genocide being the key elements of their ties. After the 2020 war, these elements somewhat shifted, to focus on deepening bilateral ties and supporting Armenia's resilience. As of January 2025, the US has invested approximately \$3.3 billion in Armenia to support democratic reforms, economic growth, and resilience, including \$340 million since 2021.¹⁰⁵

The recent deepening of relations with the US has been a significant focus of Armenian foreign policy diversification. In 2022–2024, Armenia viewed this relationship as a factor that could deter new Azerbaijani aggression against Armenia and facilitate the Armenia–Turkey normalization process. Before September 2023, Armenia hoped the deepening US connection might provide security for Nagorno-Karabakh Armenians and would foster Armenia's diversification, providing opportunities in areas such as civilian nuclear energy. After the September 2022 Azerbaijani incursion, Armenia welcomed a greater US role in the South Caucasus.¹⁰⁶ The pinnacle of the new phase in Armenia–US relations was the signature of the Strategic Partnership Commission Charter in January 2025.¹⁰⁷

Examining Armenia's and the region's potential role in US foreign policy under the Trump administration is essential. One of Trump's key foreign policy promises has been to end the Ukraine War swiftly, and he initiated direct talks with Russia to reach a ceasefire.¹⁰⁸

Whether he will take an active interest in the South Caucasus and its complex regional dynamics is likely to depend on the outcome of US–Russia negotiations over Ukraine, the broader state of bilateral relations, and the agendas of countries with which he maintains close ties. President Trump may not oppose a strong Russian presence in the region if a reset in US–Russia relations occurs, and he may no longer view the South Caucasus as a strategic theater for countering Russia.



He could also be motivated to succeed where others have failed—by brokering a peace deal between Armenia and Azerbaijan and reinforcing his image as a peacemaker. These are among the strategic variables that Armenia must take into account in the near future.¹⁰⁹

Trump's policy toward Iran presents another potential challenge for the region. Trump returned to his “maximum pressure” strategy, launched military strikes against Houthis in Yemen¹¹⁰ and simultaneously expressed a wish to reach a diplomatic solution.¹¹¹ It is challenging to assess the ramifications of this policy. Further weakening of Iran may reduce its ability to influence South Caucasus geopolitics or uphold its red lines, including preserving border integrity and opposing the “Zangezur Corridor.” Azerbaijan might then exploit the situation, attempting to forcibly open the “Corridor” through Armenia.

Alternatively, if the US and Iran negotiate a new deal, Iran's influence in the South Caucasus could grow as Tehran gains greater resources.¹¹² This scenario might enable Armenia to expand its economic cooperation with Iran and position itself as a gateway for European and American companies entering the Iranian market. Additionally, a US–Iran agreement could allow Armenia to pursue defense collaboration with Iran without facing a backlash from Washington.

Given President Trump's prioritization of US economic interests, security concerns, and national sovereignty, these considerations are highly likely to prevail over values-based drivers, such as promoting democracy and human rights, as reduction in US foreign funding shows.

Recommendations

- Armenia must prepare for various scenarios in Ukraine and Iran while actively engaging with the new US administration.
- Recognizing that promoting democracy does not drive the new administration, Armenia should reframe its call for continued US engagement in Armenia–Azerbaijan and Armenia–Turkey normalization efforts within the broader context of geoeconomic interests. Armenia could also attempt to convince President Trump to support the making of the peace deal personally.
- Given the close ties between President Trump's inner circle and the US evangelical Christian community, Armenia should, as a tactical approach, reinforce the religious dimension in its interactions with the administration.
- Armenia should consistently raise the issues of Armenian prisoners of war held in Azerbaijan and the destruction of Armenian Christian heritage in Nagorno-Karabakh.

Armenia–India Relations: Moving from Transactional to Political

Armenia has had friendly relations with India since it gained independence in 1991, based on historical connections and the positive heritage of Soviet Union–India contacts. However, relations lacked diplomatic or economic depth. The situation started to change in 2021 with Indian Foreign Minister Subrahmanyam Jaishankar's visit to Armenia.¹¹³ The real shift occurred in late 2022 when India became the top supplier of arms to Armenia, marking a visible change in defense cooperation.¹¹⁴ Armenia viewed its growing defense partnership with India as one of the ways to reduce the power gap with Azerbaijan and increase Armenia's deterrence posture. Simultaneously, given friendly relations between Russia and India, defense cooperation with India did not provoke the same resentment in Russia as Armenia's military cooperation with France. Deepening relations with one of the leading voices of the Global South is an important signal of the Armenian government's foreign policy diversification.



Meanwhile, other areas beyond defense cooperation lag, with little progress. Armenia could put forward a vision on developing a political and economic partnership with India, focusing on the establishment of minilateral groupings, such as Armenia–India–France. Another step forward could be the mutual transfer of defense technologies and the production of arms in Armenia for both local needs and export to foreign markets.

The cooperation in transport and transit should become one of the key directions of Armenia–India relations, and this is where the greatest potential resides, according to our interviews. Amid global supply chain and logistical shifts triggered by geopolitical rivalries and economic transformation, India requires alternative routes to reach Russia and Europe, and Armenia may offer a connection to:

- Russia: via Iran–Armenia–Georgia
- Europe: via Iran, Armenia, Georgia, and the Black Sea

Although Western sanctions on Iran complicate its transit potential, several developments increase Tehran's prospects of becoming a transit hub for India. These include Iran's membership in the Shanghai Cooperation Organization and BRICS, its free trade agreement with the EAEU, and ongoing negotiations for a trade agreement between India and the EAEU.¹¹⁵

India's need for these routes is closely tied to regional stability. A stable South Caucasus is essential for large-scale cargo transportation. Should Azerbaijan attack and occupy Armenia's territory to establish a "Zangezur Corridor" to Nakhijevan, this would sever Armenia's connection with Iran, effectively blocking the Iran–Armenia–Georgia–Black Sea–Europe or Iran–Armenia–Georgia–Russia routes.

Recommendations

- Armenia could suggest creating an Armenia–India State Commission on Economy and Investments at the ministerial or deputy ministerial level. This commission would explore opportunities, identify projects, and provide state support in areas such as strategic IT and pharmaceuticals.
- Armenia should enhance the existing level of defense cooperation with a focus on defense technology transfer and production in Armenia.
- Armenia could offer India to deepen political dialogue and ties, including the establishment of minilateral groupings.
- Armenia should facilitate more coordination between diasporas following the successful example of the December 2024 India–Armenia edition of the Global Diaspora Forum held in San Francisco, co-organized by the Indian Observer Research Foundation and APRI Armenia.

Armenia–China Relations: Balancing Economy and Politics

China is a major source of imports for Armenia across numerous sectors, and exports mostly copper to China.¹¹⁶ The launch of the Belt and Road Initiative in 2013 facilitated discussions in Armenia about bringing Chinese investments into Armenia's infrastructure projects, such as the "North–South highway" and the Armenia–Iran railroad via Syunik.¹¹⁷ However, China mostly focuses on the Middle Corridor in the South Caucasus, viewing it as an alternative route to reach Europe via Central Asia, the Caspian Sea, the South Caucasus, the Black Sea, and Turkey. A Chinese consortium won the tender for the construction of the new Anaklia deep sea port in Georgia,¹¹⁸ and China signed strategic partnership documents with Georgia and Azerbaijan in 2023 and 2024.



Besides basic import-export operations, until recently China's policy in Armenia was mostly focused on symbolic soft-power gestures, such as donation of public transport¹¹⁹ and medical ambulance cars, and establishment of the Confucius Institute and the Armenia–China Friendship School in Yerevan.¹²⁰

To this date Armenia's foreign policy diversification has not significantly changed Armenia–China relations. Yerevan was mostly focused on deepening Armenia's relations with the US and the EU, and the growing West–China confrontation did not bode well for the deepening of bilateral Armenia–China political relations.

Meanwhile, Azerbaijan seeks to portray the so-called “Zangezur Corridor” as part of the Middle Corridor,¹²¹ thus trying to convince China to support its establishment.

However, China is not satisfied with a situation in which it has a strategic partnership with two of the three South Caucasus republics. According to several interviews for the report, China is also interested in establishing a strategic partnership with Armenia and looking through options to support the Armenia–Azerbaijan negotiation process by offering Chinese soil as a platform for meetings during multilateral summits. China believes that any new war in the South Caucasus may negatively impact the region's transit potential, harming Chinese interests. This could be one of the points of leverage used to prevent a new escalation by Azerbaijan. As the US–China rivalry will deepen under President Trump, Yerevan should carefully assess the potential implications of establishing a strategic partnership while assessing a longer-term strategy to address how China fits Armenia's foreign policy priorities.

Recommendations

- Armenia should amplify the message to China that any new escalation by Azerbaijan against Armenia would jeopardize the functioning of the Middle Corridor, thus depicting the new escalation as a direct challenge to China's economic interests.
- Armenia should counter the narrative that the “Zangezur Corridor” is an important part of the Middle Corridor by messaging the idea that the Crossroads of Peace project implementation will facilitate the Middle Corridor.
- Armenia should assess opportunities for collaboration with Chinese companies to construct solar power plants. According to the International Energy Agency, China's share in all the manufacturing stages of solar panels exceeds 80%.

Armenia–Arab World Relations: An Important Direction of Diversification

Since gaining independence, Armenia has pursued friendly relations with the entire Arab world and has largely succeeded, except with Saudi Arabia, which refrained from establishing diplomatic ties with Armenia until 2023. In the 1990s and 2000s, Armenia's Middle Eastern foreign policy focused on strengthening relations with Lebanon, Syria, Iraq, and Egypt, driven by their large and well-established Armenian communities.

As Armenia diversifies its foreign policy, the UAE, Saudi Arabia, and the KRG have emerged as important partners.

Armenia and the UAE have also taken steps to deepen economic cooperation. Notable initiatives include an agreement with Masdar, a UAE-based energy company, to construct a 200-megawatt solar power plant in Armenia¹²² and establish Fly Arna, a national airline created in partnership with Air Arabia and the Armenian National Interest Fund. While Fly Arna was declared the “national carrier”¹²³ by the Armenian government, it has since lost its operating license.¹²⁴ Additionally, the solar power plant project has not yet commenced.



Despite these setbacks, trade with the UAE has surged in recent years. From January to August 2024, the UAE replaced Russia as the top destination for Armenian exports, accounting for more than \$4.3 billion.¹²⁵ This growth was driven primarily by the reprocessing and exporting of goods, including precious metals and gems, imported from Russia and then re-exported to the UAE.¹²⁶ The recent establishment of a visa-free regime with the UAE will further facilitate bilateral relations. One of the most notable achievements in Armenia's recent foreign policy diversification has been the establishment of diplomatic ties with Saudi Arabia in 2023,¹²⁷ followed by a visit by Armenia's foreign minister in April 2024.¹²⁸ As a growing regional power and a leader in the Arab and Islamic worlds, Saudi Arabia's partnership with Armenia carries significant geopolitical weight.

Its influence as a member of the Organization of Islamic Cooperation and other multilateral platforms positions it as a valuable ally in fostering constructive cooperation between Armenia and other nations. With Saudi Arabia's capacity to provide large-scale, long-term capital, bilateral projects could focus on infrastructure development and broader economic initiatives to drive sustainable growth in Armenia.¹²⁹

Another important milestone in relations with the Arab world has been the Armenian government's decision to recognize Palestine's independence. By taking this step, Armenia followed the lead of some European countries and also hoped to create a favorable environment for attracting investments from Gulf countries.

Armenia took steps to expand cooperation with the KRG as an essential gateway to access Middle Eastern markets.¹³⁰

As Armenia diversifies its foreign policy, relations with the Arab world should remain a cornerstone of its strategy. The Gulf countries, particularly the UAE and Saudi Arabia, pursue balanced foreign policy approaches by maintaining strong ties with the US, China, and Russia. Deepening cooperation with these nations strengthens Armenia's economy and can help enhance its international standing without antagonizing global powers.

Recommendations

- Armenia should identify and pursue targeted co-investment opportunities with the UAE, Saudi Arabia, and Qatar. Priority sectors for collaboration include agriculture, artificial intelligence, clean energy, and deep technology.
- Given the situation in Lebanon and the political upheaval in Syria, Armenia could develop dedicated programs to support Armenians in these countries. These steps should be implemented closely with the Lebanese government and the new government of Syria to ensure a collaborative and effective approach.
- Armenia should explore opportunities to deepen cooperation with Iraq and the KRG to create additional access points to Middle Eastern markets, fostering greater regional connectivity and economic engagement.
- Armenia could also prioritize forms of cultural cooperation with the emerging power centers of the Arab World, including by fostering musical exchanges, artistic production, and educational spaces.



Conclusion

Armenia's Western-focused diversification between 2022 and 2024 came in response to a changing balance of power in the South Caucasus, characterized by the decline of Russia's influence, the increase of Turkey's status, and a more assertive Azerbaijan. The Armenian government seems to have considered the most effective approach to strengthening its deterrence position to be fostering relations with the US and the EU and securing large-scale defense cooperation with India while providing a minimum level of security for Nagorno-Karabakh Armenians.

The military takeover of Nagorno-Karabakh by Azerbaijan and the forced displacement of Armenians in September–October 2023, the shifting dynamics of the Ukraine War with Russia's slow but steady military advances, the changes in Georgia–West relations, and the possibility of decreased Western involvement in the South Caucasus have shifted regional dynamics again, leading Armenia to readjust its foreign and security policy.

In this evolving and uncertain landscape, Armenia should continue pursuing diversification with a lesser focus on its Western branch. This does not mean that Armenia should renege on already-achieved “upgrades,” such as the strategic partnership with the US or the new partnership agenda with the EU; it means that Armenia should more actively and concretely engage with Global South powers and seek to find a new *modus operandi* with Russia.

The Damocles sword for Armenia is Azerbaijan's maximalist approach, reminding Yerevan of the possibility of a new act of aggression hanging over and undermining regional stability. In this context, Armenia's primary goal should be to boost its military, political, and economic deterrence capacities and restore the balance of power in the region as the only viable tool to prevent a new war.



Deepening Diversification for Greater Deterrence: Recommendations

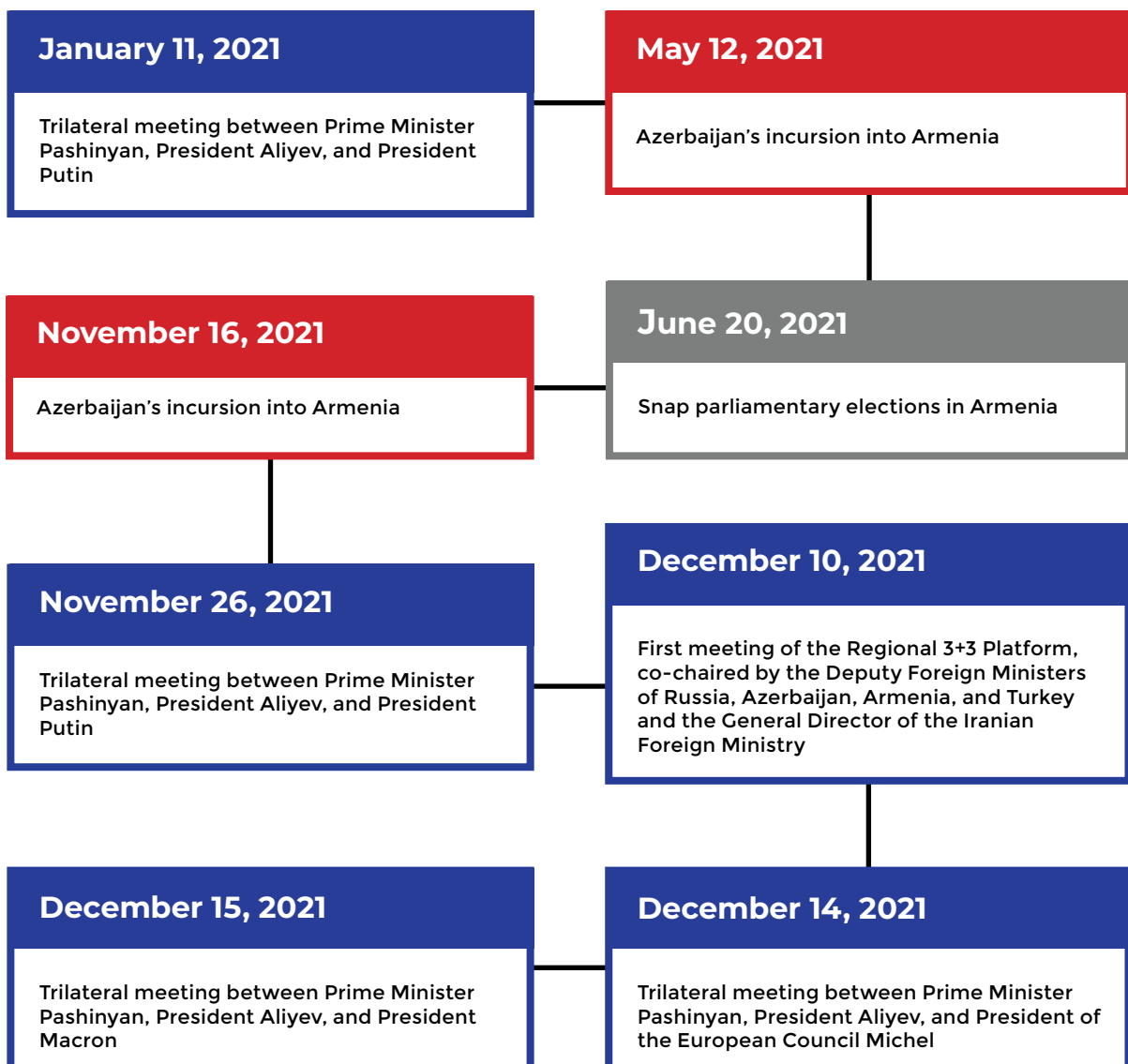
- **Strengthen deterrence through a dual-track engagement:** Advance Armenia's deterrence posture via a path of military modernization, fortified borders, and diplomatic outreach to key partners. This approach should raise the military, political, and economic costs of any potential Azerbaijani aggression. Increased engagement with powers that actively back or have a vested interest in maintaining stability and prosperity in the South Caucasus—such as Russia, Iran, the US, and the EU—would be particularly beneficial.
- **Engage Turkey:** Continue efforts toward normalization with Turkey while seeking to decouple this process from Armenia–Azerbaijan negotiations to weaken the Ankara–Baku alliance. Support from other actors, such as the US and the EU, in persuading Turkey to abandon conditionality would be an asset.
- **Strengthen economic ties across open borders:** Expand economic, energy, and infrastructure cooperation with Iran and strengthen economic relations with Georgia with the active involvement of Armenian businesses.
- **Reset relations with Russia:** As the character of the bilateral relationship evolves, Armenia should clearly articulate its vision for a new relationship with Moscow. At the same time, it must maintain open communication with its former top partner to ensure strategic transparency and reduce the risk of miscalculation.
- **Strengthen partnerships with the EU and the US:** Build on the momentum of the new EU–Armenia Partnership Agenda and the US–Armenia Strategic Partnership Charter. Reframe Armenia's international positioning to emphasize its aspirations as a stabilizing and convening force in the region.
- **Reinforce partnerships with the Global South, particularly on the economic front:** Build on the economic drive of emerging powers' diplomatic strategy to expand trade, attract investments in sectors such as emerging technologies and renewables, and develop multilateral cooperation formats to increase Armenia's economic and geopolitical options.



Appendix: Timeline of Key Events, January 2021–January 2025



2021





2022

January 14, 2022

First meeting of the Special Representatives for the normalization process between Armenia and Turkey, Rubinyan and Kılıç

February 4, 2022

Online meeting between Prime Minister Pashinyan and President Aliyev with the mediation of President Macron and the President of the European Council Michel

March 24, 2022

Azerbaijan's incursion into Parukh village in Nagorno-Karabakh

February 24, 2022

Start of the Russia-Ukraine War

April 6, 2022

Trilateral meeting between Prime Minister Pashinyan, President of the European Council Michel, and President Aliyev

May 22, 2022

Trilateral meeting between Prime Minister Pashinyan, President of the European Council Michel, and President Aliyev

August 25, 2022

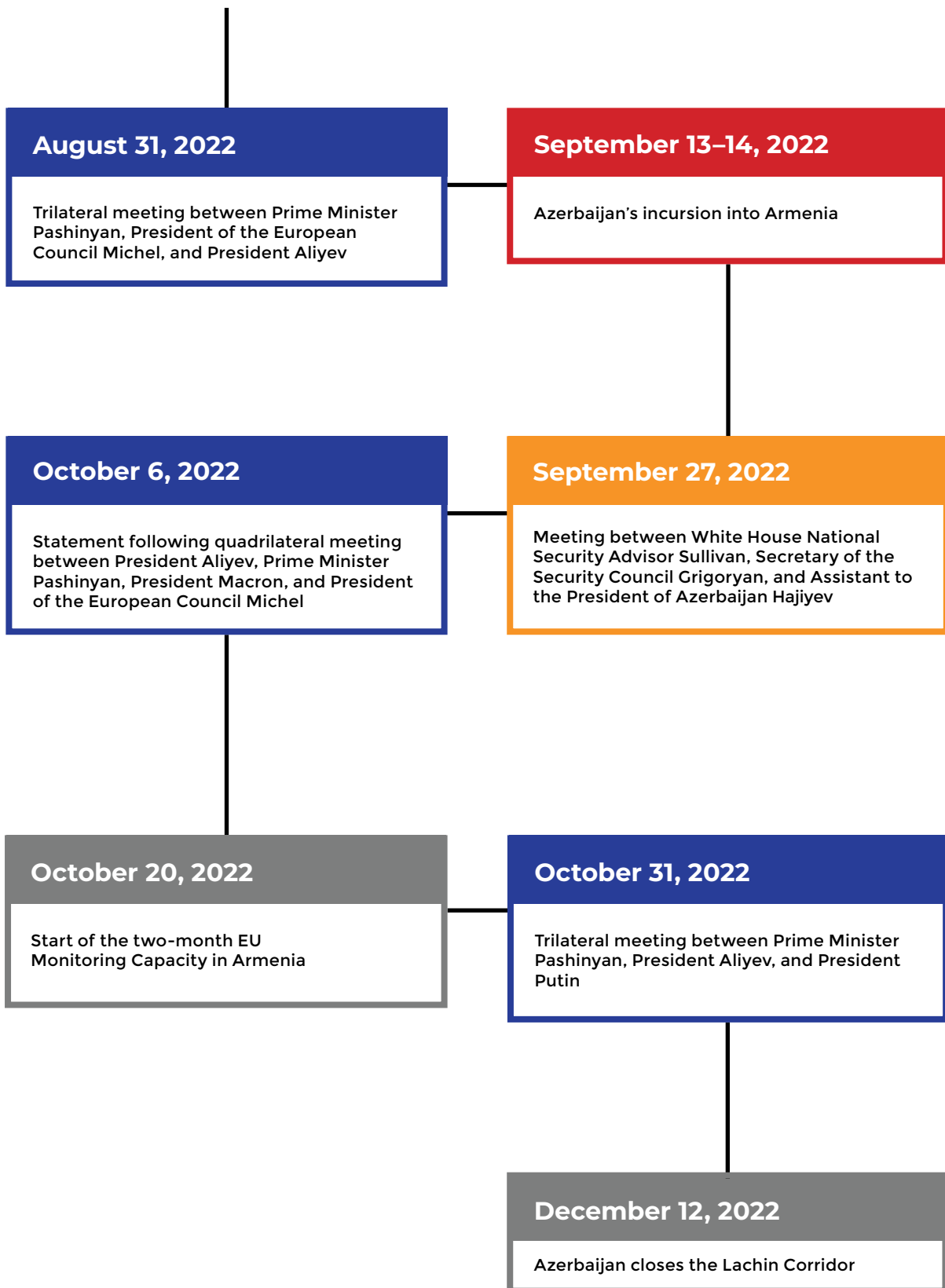
The Armenian villages of Aghavno, Berdzor, and Sus along the Lachin Corridor are handed over to Azerbaijan

May 24, 2022

First meeting between the border delimitation and demarcation commissions of Azerbaijan and Armenia



ARMENIA'S FOREIGN POLICY AFTER THE SECOND KARABAKH WAR



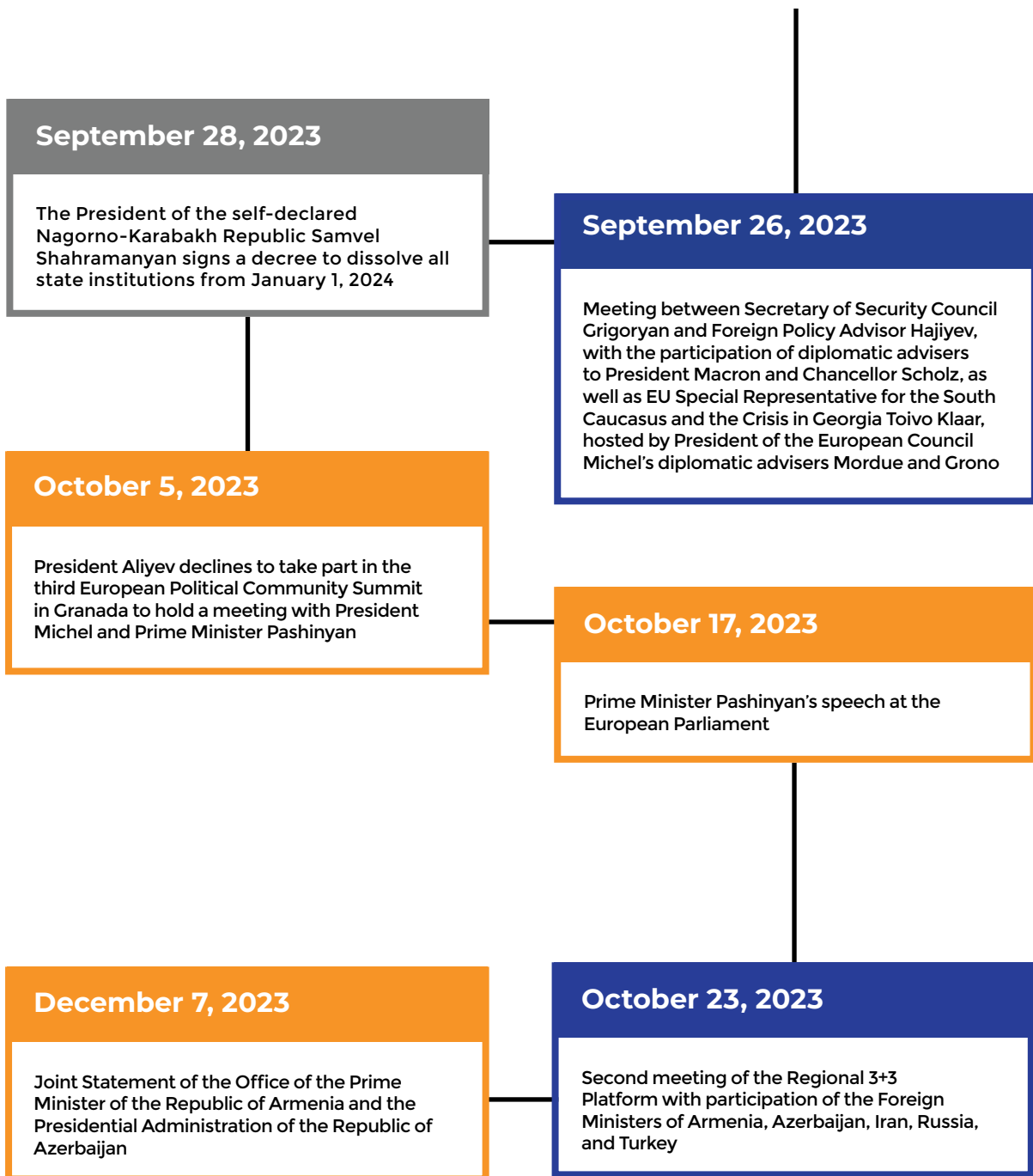


2023



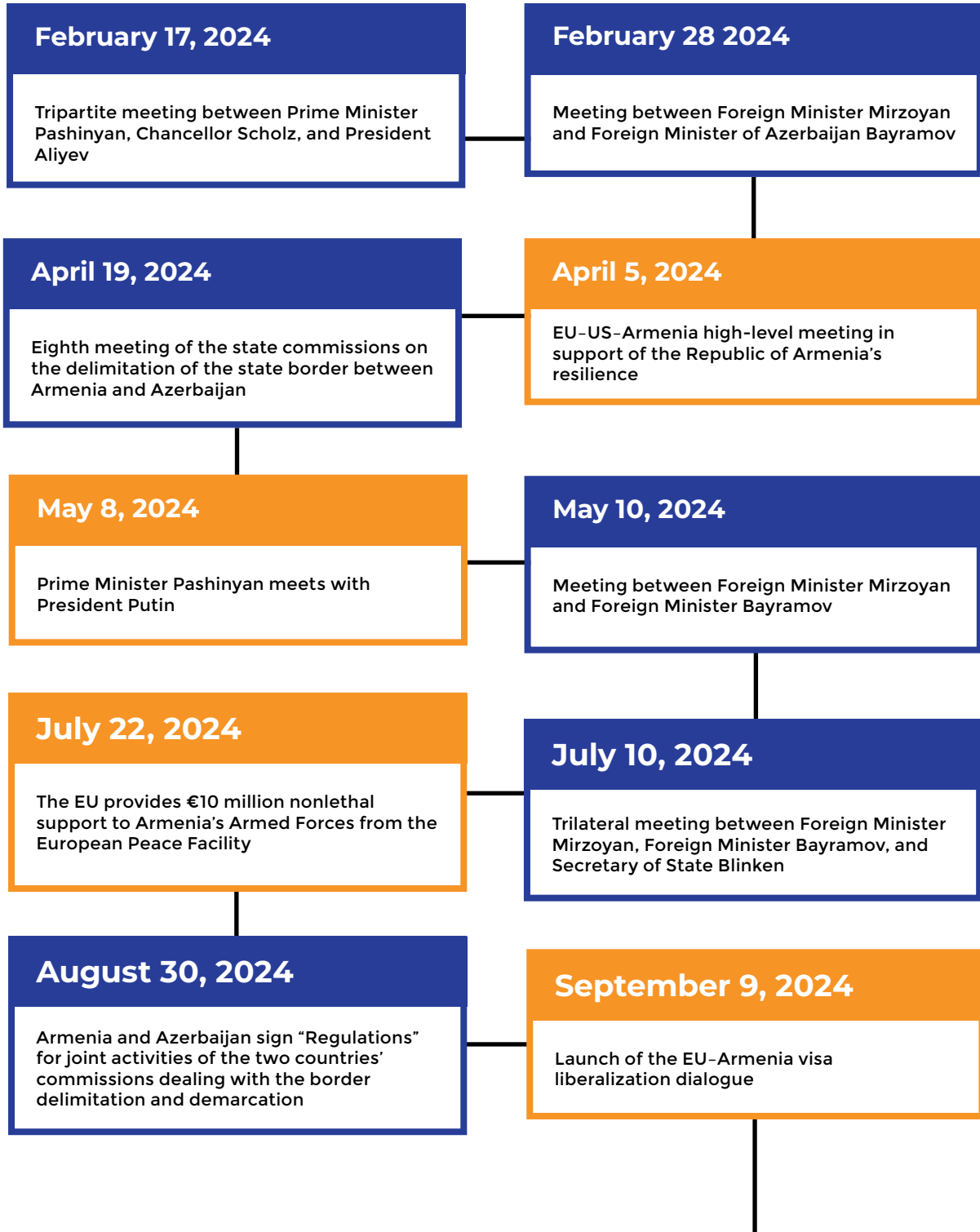


ARMENIA'S FOREIGN POLICY AFTER THE SECOND KARABAKH WAR



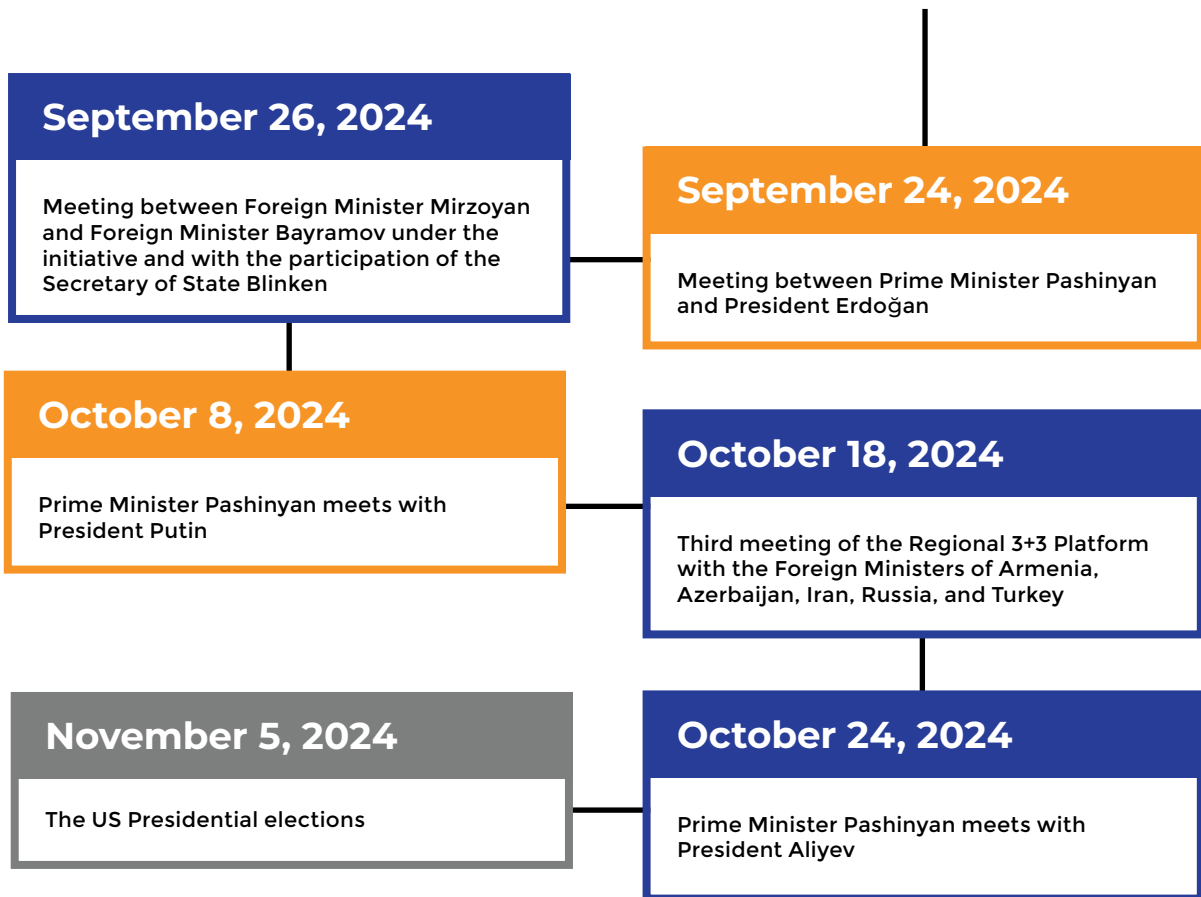


2024

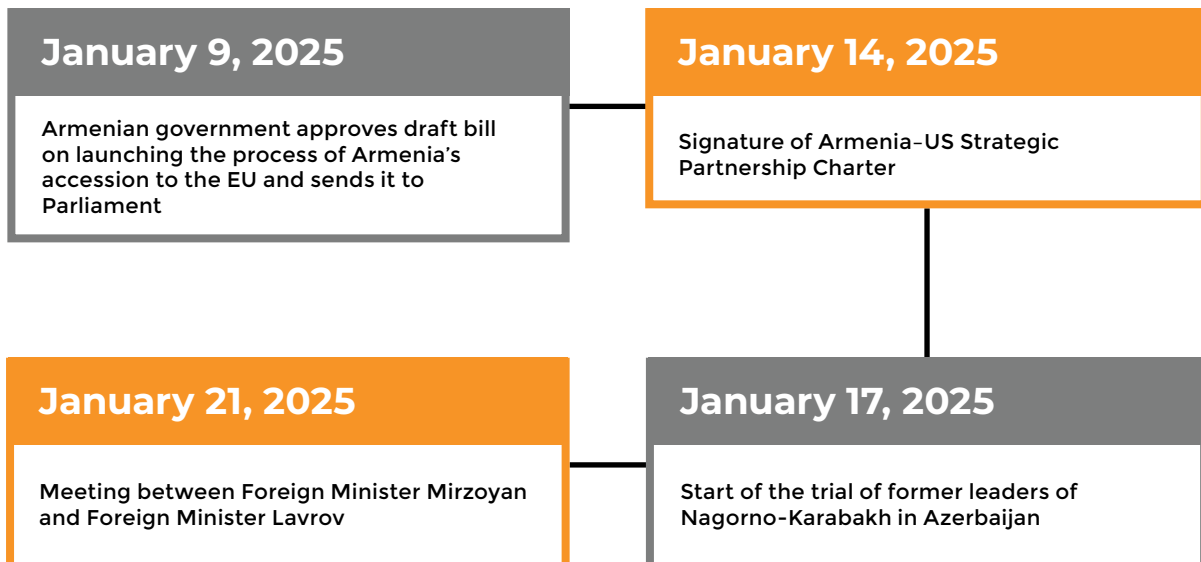




ARMENIA'S FOREIGN POLICY AFTER THE SECOND KARABAKH WAR



2025





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Applied Policy Research Institute of Armenia

2/2 Melik Adamyan Street, Yerevan, Armenia

connect@apri.institute

apri.institute