

White Paper

Armenia's Security and Democratic Trajectory in a Fractured Region

Contributing Authors

Dr. David Akopyan

Dr. Stephan Astourian

Dr. Hrair Balian

Artin DerSimonian

Anna Gevorgyan

Dr. Alexander Iskandaryan

Dr. Nerses Kopalyan

~~Dr. Anatol Lieven~~

Garo Paylan

Dr. Tigrane Yegavian

Editors

Dr. David Akopyan

Dr. Hriar Cabayan

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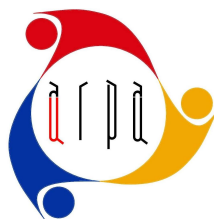


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Scope

Armenia faces existential security dilemmas while striving to preserve its fragile democracy. How can a small state navigate authoritarian neighbors, shifting alliances, and geopolitical competition? The recent Washington Accords signed on August 8, 2025, with US President as a mediator open possibilities for normalization with Azerbaijan yet raise questions about Armenia's trajectory. Meanwhile, the forced displacement of over 120,000 Armenians from Nagorno-Karabakh (Artsakh) underscores urgent humanitarian and human rights concerns that continue to reverberate. This White Paper will examine what these developments mean for Armenia and the South Caucasus, and how they reflect broader global and regional trends in security, sovereignty, and democratic resilience. It will also examine the various aspects of the challenges and headwinds facing Armenia. The goal is to examine beyond the current horizon and look strategically at 3-5 years perspective.

Background

The long and complex history of Armenia and decades of Soviet rule during the Twentieth Century have resulted with unique cultural, social, and political characteristics of the nation. These impact the future trajectory of the nation. By looking strategically ahead 3-5 years, this White Paper will address several key geostrategic developments.

The last 7 years trajectory was especially dramatic. With peaceful protests and change of power in 2018, the country was set to progress on a democratic trajectory. However, the 2020 war, the humiliating defeat from Azerbaijan, and the ethnic cleansing that followed in Armenian populated Artsakh were devastating blows for the nation's self-esteem. The August 8, 2025 Washington DC accord gave the country a chance to avoid major military conflict, and a breathing space to move slowly to normalizing relations in the region with both arch enemies -Azerbaijan and Turkey. Meantime, multiple global and regional turbulences during the last years have impacted Armenia and the region. The situation is still very fragile.

So far, efforts on political, military and economic solutions have been more trouble shooting and avoiding military confrontation than longer term remedies. Recent developments have opened a window of 2-3 years for peace, and an opportunity to build better resilience for future challenges. With multiple moving parts, Armenia needs to find a more strategic and medium to long-term path for survival and prosperity. Major issues in need of strategic reflection include:

1. Will the current US Administration and friendly countries in the EU remain focused on the region and support peace?
2. What needs to be done for Armenia's leadership to be ready when a new US Administration takes over in early 2029?
3. When TRIPP becomes operational and the Meghri Railroad is rebuilt, will the current peace process be maintained or end abruptly with new demands from Azerbaijan?

4. Will Russia be weakened after the Ukraine war is an open question? Will Russia refocus on the South Caucasus?
5. Azerbaijan's energy exports are likely to decline - while gas exports are expected to rise, overall hydrocarbon export revenues have passed their high point. The question remains: how the economy of Azerbaijan will evolve in the coming decade and what possible impact that would have on the country's defense and regional standing

Topics to be Addressed

Dr. Hriar Cabayan

Will the US, stay focused on the region within the 3-5 years times and with a new President?

Assuming some resolution of the Ukraine war in medium term, a weakened Russia may still want to re-establish its influence in the S. Caucasus, how to ensure that US stays committed in the Russian backyard and what diplomatic effort could help to balance the Russia, USA, Turkey, Iran relations in region?

How will Azerbaijan behave with diminishing oil/gas revenues, what are in 3-5 years perspectives of Azeri economy?

How will a weakened Iran behave?

Turkey's next Presidential elections are scheduled to take place in 2028. Outcome will have a bearing on the region.

Bottom Line: What should Armenia be doing to use to maximal benefit next few years of peace interlude to enhance its economy, army, diplomacy etc.

Executive Summary

Dr. Hriar Cabayan

The sections below briefly summarize each of the contributions. The summaries are primarily meant to entice the reader to read the full chapters and have intentionally been kept short.

In his article titled “Armenia - in a Times of Regional Turbulences and Global Lawlessness”, Dr. David Akopyan observes that Armenia is rapidly becoming one of the most exposed democracies on Earth. He raises a key question: Can a small, landlocked democracy reorient its foreign policy toward the West quickly enough to survive the ambitions of those surrounding it. He goes on to point out that Armenia’s future hinges on whether it can use this brief period of reduced tensions to restore deterrence, diversify alliances, and reinforce economic and institutional resilience. He states Armenia must navigate this transition not with the tools of a protected small state but with the strategies of a vulnerable actor in a competitive region.

To survive in an increasingly lawless international system, he recommends Armenia must pursue a strategy of pragmatic resilience—internal consolidation combined with external diversification.

Accelerate Military Reforms: Defense modernization

Effective Engagement with Washington

Deepening European Integration

Maintaining Open Channels with Moscow and Tehran

Economic Resilience and Defense Industrial Development

Narrative Warfare

He concludes by stating Armenia stands at a rare juncture: vulnerable but facing new opportunities, isolated but increasingly visible, pressured but capable of redefining its geopolitical posture. The direction it takes now toward resilience will shape the country’s sovereignty for the coming decade.

In their article, “General Perspective”, Artin DerSimonian and Dr. Anatol Lieven state upfront that the South Caucasus is experiencing significant upheavals and to survive and thrive in such an environment will require sophisticated statesmanship. They go on to say that the fraying of the post-World War II international order adds an additional destabilizing element to the leaders of three Caucasian republics. As such, the South Caucasus, situated as it is along strategic crossroads between the Eurasian heartland, the Middle East, and Europe is unlikely to avoid becoming entangled in the brewing competition. Therefore, the three countries in the region must play their hand very carefully in the coming years. The authors go on to state that the South Caucasus has become more interwoven with the wider Middle East, Central and South Asia, and the European continent itself. These changes present both alluring opportunities as well as perilous tests for the three young republics. The changing landscape of the last several years, the authors argue, has proven largely beneficial to Turkey while Russia has faced repeated setbacks and diminutions of its power, and Iran has been distracted and weakened. Nevertheless, Iran maintains core strategic interests in the South Caucasus and Russia remains a significant actor and possesses tools to advance its own interests. They posit that these reverberations have produced both opportunities and challenges for the three South Caucasian republics. Navigating these stormy conditions will demand clarity of purpose and a sophisticated understanding of what is driving these winds of change. For Armenia, the fundamental necessity is the preservation of the state and improvements to its security and prosperity. Achieving these objectives amidst a polarized domestic political environment and surrounded by an improving but still fragile regional security architecture will require a delicate balancing and diversifying of foreign relations. They conclude by stating for Yerevan’s approach to succeed, a clear-headed recognition of its limits is essential, for only then can Armenia pursue that which is possible and fruitful.

In an article entitled “America Pivots to the South Caucasus: The Washington Accords, Regional Interconnectivity, and Armenia’s New Security Architecture” Dr. Nerses Kopalyan states up front that The Washington Summit held on August 8, 2025 at the White House between Prime Minister Pashinyan, President Trump, and President Aliyev was the culmination of months of negotiations between the three sides that culminated with the Accords. He points out the TRIPP Implementation Framework (TIF) between

Foreign Minister Mirzoyan and Secretary of State Rubio outlines America's 49-year commitment in the joint venture with Armenia. He goes on to say that TIF envisions America's regional objectives of securing open communication, trade, and connectivity in the South Caucasus to promote peace, stability, and prosperity in the region as well as enhancing market access in the Trans-Caspian region for the long term. He points out it secures America's strategic interests in both the South Caucasus and Eurasia defined by trade, stability and interconnectivity. This also includes the opening of borders with Turkey in the very near future. He states the overarching American approach in offering creative (economic, energy, infrastructure, etc.) incentives to both sides was to make certain they adhere to U.S. objectives and use these developments to formalize a normalization framework that will lead to the signing of a final peace agreement. He points out the normalization process has brought about for Armenia a state of de facto peace and has given it a transit route that it controls and at the same time strengthens its position as a regional actor. He concludes by stating that the contours of TRIPP are not temporary US policy, but an institutionalized grand strategy. This, in turn, serves as an enhancement qualifier for Armenia's nascent security architecture and the stabilizing role that vested US interests play in the region.

In an article entitled "Russia and the South Caucasus after Ukraine: Is it possible to step into the same river?" Dr. Alexander Iskandaryan makes a key statement up front: Whatever the outcome of its war with Ukraine, Russia is likely to lay claim to its sphere of influence in the former USSR. He goes on to state for the countries of the South Caucasus, Russia will remain a significant player. He posits that with the dissolution of the Nagorno-Karabakh Republic, Russia lost its leverage over the region's security. As a result, Armenia began a hurried quest for other security partners. However, there is a limit on what Russia can do. He states that had the Kremlin truly aimed to remain the number one external player in the South Caucasus, allowing Azerbaijan to recapture Nagorno-Karabakh has been a disaster in the light of that aim. That said, Russia will undoubtedly remain present and engaged. He concludes by observing Russia is home to the world's largest Armenian diaspora and is likely to continue meddling in the relations between the two countries. He concludes by stating in a strategic sense, Russia's influence in the region has diminished significantly, and there are no tools in sight that can bring it back.

In an article entitled “Armenia’s Security and Democratic Trajectory in a Fractured Region, Implications for the European Union” Tigran Yegavian states up front Armenia today occupies a singular position in the European Union’s eastern neighborhood. It is simultaneously one of the region’s most politically pluralistic states and one of its most strategically vulnerable. He observes from Yerevan’s perspective, the EU is increasingly present but not fully protective, influential yet constrained, supportive yet cautious. He points out the EU’s engagement with Armenia reflects a fragmented political landscape shaped by diverging national priorities, threat perceptions and bilateral interests. In this context:

Core Supporters: France, Greece, Cyprus, and the Baltic states

Cautious Supporters: Germany, Italy, and Spain

Reluctant or Obstructive Actors: Hungary

He goes on to address the EU Monitoring Mission (EUMA) and points out beyond its symbolic reassurance value for Armenia, it has so far failed to generate tangible deterrence effects and has not substantially altered Azerbaijan’s calculus on the use of coercion. He observes in its current form, EUMA functions primarily as a confidence-building and observation mechanism, rather than as a tool of deterrence or accountability

He addresses The EU’s decision to adopt a Strategic Agenda with Armenia in December 2025, rather than formalizing a Strategic Partnership Agreement, and observes it reflects a deliberate political compromise shaped by internal EU constraints rather than by the depth of EU–Armenia engagement itself. This allows the EU to strengthen cooperation with Armenia while preserving a degree of strategic ambiguity, reduces legal complexity, avoid reopening ratification debates, and ensures continuity across policy cycles.

He concludes by stating Armenia stands at the intersection of three systemic crises: the erosion of post-Cold War security architectures, the weakening of international law, and the vulnerability of small democracies in coercive regional environments. Its trajectory will be shaped not only by domestic choices, but by the willingness of external actors like the EU to engage beyond declaratory support.

In an article entitled “Regional Power Shifts: Why Iran still matters for Armenia” Ms. Anna Gevorgyan makes the point upfront that since 2022 Armenia’s foreign and security architecture has undergone significant reshaping due to shifts in regional power balances. As a result, Armenia has pursued an adaptive, balanced multi-vector foreign policy. She states that Iran’s approach to the South Caucasus reflects several core national security priorities.

Safeguarding territorial integrity

Preventing border changes

Limiting extra-regional military involvement

Balancing Turkey’s regional influence

She points out that Iran’s current regional policy is situated at a crossroads marked by economic crisis, political fragmentation, uncertain leadership dynamics, and escalating tensions. She provides a background to the protests and points out that internal dynamics remain mostly fragmented and points out these have narrowed the possibility of future internal dialogue. She posits the coming phase may bring a transformation of Iran’s political identity—from a predominantly Islamic framework toward a more nationalistic discourse. She points out that Iran’s internal instability and external confrontation pose significant risks for Armenia’s security environment and concludes by stating for Armenia, all scenarios underscore the importance of maintaining strategic flexibility, safeguarding connectivity routes, and reinforcing diplomatic engagement with all major actors involved in Iran’s trajectory.

In an article entitled “Armenia’s Security and Azerbaijan” Dr. Stephan Astourian provides a broad geopolitical perspective upfront re the accelerating pace of history in which we live and the fact that the current transformations are complex. He states what is happening in the S. Caucasus should be understood within this broader context as one conflict amongst many others and goes on to observe that all the agreements that have been signed should be looked at with modesty. He also advocates prudence in assessing where Azerbaijan may be heading in its relations with Armenia over the next few years. In this context, he points out for the West, Azerbaijan is the key link between Central Asia and Europe, and Armenia is the weaker player. As such,

Azerbaijan has no significant incentive to be in a rush to sign the peace treaty with Armenia and Türkiye has no reason to be in a hurry to open its border with Armenia. He encourages the reader to keep in mind several key issues that need to be kept in mind, amongst which Azerbaijan's importance to key players which is measurably higher than that of Armenia. He points out this great imbalance between the two countries is a good starting-point to assess where things stand and where they will be heading. He points out further actions were required to sign the peace agreement, such as including amendments to Armenia's constitution that would eliminate territorial claims against Azerbaijan. He goes on to point out Azerbaijan has also been breaching the Peace Treaty, which states the Parties confirm that they do not have any territorial claims to each other and shall not raise any such claims in the future. In addition, the peace treaty enjoins that the "Parties condemn and shall combat intolerance, racial hatred and discrimination, separatism, violent extremism and terrorism in all their manifestations within their respective jurisdictions." As such the State-sponsored "Armenophobia" permeating Azerbaijani society, from elementary school textbooks to public discourse, does not comply with this Article. He points out after the peace treaty was initialed and the TRIPP document signed, the statements and rhetoric of the top Azerbaijani officials became overall positive but also somewhat ambiguous, asserting that peace had been established, but Armenia had to make some more efforts for its signing, such as constitutional change. He concludes by listing several issues that make predictions difficult, such as outside actors and internal Armenian political challenges. He states much will depend on the degree of influence, or pressure, Washington is willing to exert on Azerbaijan and Türkiye and asserts the transition from "formal" peace to real peace would require much time and also reforms by Azerbaijan.

In an article entitled "From Isolation to Leverage: Armenia's Strategy Toward Turkey" Garo Paylan makes a key point upfront that Armenia is navigating one of the most consequential periods since independence and that the country is facing the dual challenge of safeguarding its security while preserving its democracy. He points out within this context, relations with Turkey occupy a critical place in Armenia's strategic calculus. As such a meaningful normalization process can contribute to Armenia's security by creating stability, improving connectivity and increasing Armenia's economic options. He points out that such normalization carries substantial geo

economic potential: It would transform Armenia's access to global markets and would reposition Armenia within regional connectivity and energy discussions.

He concludes by stating that Normalization with Turkey is not a panacea, but it is a strategic necessity in a fractured region. If managed carefully, it can reduce isolation, strengthen Armenia's economy, and expand diplomatic options. The full normalization of relations holds transformative potential and can shift Armenia from isolation to regional integration, anchor a durable westward orientation, and help ensure that Armenia enters the next phase of regional competition not as a passive object of power politics, but as an actor with agency and options.

In an article entitled "Notwithstanding Positive Changes, Four Existential Challenges Imperil Future of Armenia" Dr. Hrair Balian states up front that Armenia has expanded its international relations by diversifying its partners beyond traditional reliance on Russia, with a particular focus on strengthening ties with the United States, European Union, France, and India. He points out Armenia's economy has grown significantly in recent years fueled by a surge in incomes, capital inflows, consumption, and the influx of high-tech specialists and investments. He identifies several geopolitical challenges that Armenia faces:

Persistent gaps in national security

Rise of authoritarian governance, democratic backsliding, and political polarization

Demographic decline

He points out Armenia is strengthening ties with the U.S., EU, France, India and China for strategic partnerships, focusing on security procurement, economic development, and connectivity projects. He goes on to say while Armenia has made notable strides in modernizing its military, the consensus among experts is that these improvements are an important "step in the right direction" but require sustained commitment, increased funding, and more coherent implementation to achieve sufficient deterrence capabilities. In this context he makes several key observations:

- National security readiness requires a more comprehensive approach

- Armenia's security gaps remain the elephant in the room.

He points out Armenia's economy has been marked by resilience and steady growth for over two decades. To build on this, the government is focusing on improving competition, investing in renewable energy, boosting agriculture, and enhancing digital infrastructure. However, there are economic, political, and development challenges in need of reform, including infrastructure deficiencies, high energy costs, export diversification, improving education to enhance human capital, poverty, and improving governance institutions.

He points out while there has been progress with building robust state institutions, such progress has been stunted by political polarization and executive power consolidation. In this context, Freedom House has raised concerns about executive overreach, lack of transparency in ruling party finances, and judicial independence. These will require fundamental changes.

Under the heading "Peaceful Coexistence Amidst Regional and Global Rivalries" he points out Armenia's relations with its immediate neighbors remain problematic. He discusses the recent Armenia and Azerbaijan signed documents in Washington and points out on the positive side, the Washington agreements ended, at least temporarily, President Aliyev's incessant demands for new preconditions and suspended imminent threats of an Azerbaijani aggression against sovereign Armenian territory. However, durable peace remains elusive due to major gaps in the agreed documents

He concludes by stating in the next decade, Armenia can expect a future with both economic opportunities and persistent geopolitical challenges. Success will depend on effective remedies to the challenges facing the country. For a small state, failure to break with its past trajectory and not to face the future with sobriety could result not only in further democratic backsliding but also in potential territorial losses. He concludes by stating Armenia must tread the next decade with extreme caution and wisdom.

Armenia - in a Times of Regional Turbulences and Global Lawlessness

Dr. David Akopyan

Executive Summary

As the old-world order collapses and new spheres of influence take shape, Armenia — long seen as a Russian satellite — is rapidly becoming one of the most exposed democracies on Earth.

Its dilemma is stark: can a small, landlocked democracy reorient its foreign policy toward the West quickly enough to survive the ambitions of those surrounding it — and will anyone care if it fails?

For decades, Armenia's security was rooted in dependence on Moscow. It hosted Russian military bases, joined the Collective Security Treaty Organization (CSTO), and tolerated Kremlin dominance in exchange for what it believed were security guarantees. But when Azerbaijan attacked — first Nagorno Karabakh in 2020, then inside Armenia proper in September 2022, blockading Nagorno-Karabakh through 2022–23 and driving out over 120,000 Armenians in September 2023 — Russia stood aside. Russian peacekeepers did not intervene. The alliance collapsed without firing a shot.

This rupture accelerated reorientation. Armenia intensified cooperation with the United States, signed a Strategic Partnership Charter, deepened engagement with the European Union, expanded defense cooperation with France and India, and pursued cautious dialogue with Turkey. It also maintained pragmatic ties with Iran, aware that Tehran remained the only non-hostile southern outlet. Yet by mid-2025, Armenia still lacked hard security guarantees.

August 8, 2025, Washington Summit marked a turning point. President Trump hosted Armenia's Prime Minister and Azerbaijan's President, brokering a preliminary Armenia–Azerbaijan framework and signing bilateral accords with both sides. Washington's blend of coercive leverage and selective incentives appear, to have reduced the risk of renewed war. Analysts note that, for the first time since 2020, the South Caucasus has

entered a phase of pragmatic coexistence under partial U.S. supervision — an outcome unimaginable even a year earlier.

Armenia's future hinges on whether it can use this period of reduced tensions to restore deterrence, diversify alliances, and reinforce economic and institutional resilience before another systemic shock arrives.

Collapsing World Order: The Rule of the Jungle Replacing the Rule of Law in a New Hobbesian Era

The international rule of law is collapsing in slow motion. Over the past decade, the world has absorbed a series of geopolitical shocks — Russia's first war against Ukraine in 2014, Brexit, Turkey's military incursions into Syria in 2017–18, and the 2020 war over Nagorno-Karabakh. Russia's full-scale invasion of Ukraine in 2022 marked a deeper rupture in the post-Cold War order, triggering cascading aftershocks that reached the South Caucasus with Armenia's loss of Nagorno-Karabakh in 2023.

By 2025, under Trump's second administration, turbulence has become the new normal. The U.S. president's early rhetoric about revising borders — from musings over Greenland and the Panama Canal to threats against Canada's sovereignty — has signaled to smaller nations that “might makes right” has returned as an acceptable organizing principle. Moscow's continued revisionism only reinforces that trend. As Ian Bremmer noted in his Top Risks for 2025, the world's primary danger is “the breakdown of the international order — replaced by the law of the jungle.”

Armenia is caught in the middle of this, when institutions that once shielded small states have lost effectiveness. The South Caucasus is no longer governed by UN and OSCE norms, Russian oversight, or Western involvement. The collapse of the old order has stripped away the norms, guarantees, and great-power constraints that once offered small states breathing space. In their place a Hobbesian landscape has emerged where raw power defines security.

Trump's Diplomacy: Coercion with Incentives

Donald Trump's second term has reintroduced a transactional approach to international relations — one that strips diplomacy of moral claims and treats allies and adversaries alike as negotiable assets.

August 8, 2025, Washington Summit exemplified this new operating system. The U.S. president deployed his signature “carrot and stick” method — threatening punitive trade measures and targeted sanctions while dangling selective incentives: investment, technology partnerships, and limited, carefully phrased security assurances.

Washington effectively froze Azerbaijan's military ambitions by converting Baku's demand for an extraterritorial “corridor” into a U.S.-supervised Peace and Prosperity Route — a transit arrangement across southern Armenia, under Armenian sovereignty, while delivering connectivity to Azerbaijan. This created breathing space without providing the kind of formal defense guarantees that traditional U.S. allies receive. Trump was blunt: America would facilitate peace and investment, but it would not “babysit” either side.

For Azerbaijan, the message was clear. The U.S. offered Baku access to Western infrastructure finance and participation in the expanding Middle Corridor logistics network — conditional on maintaining peace and opening trade routes under American oversight. Trump's national security team framed the arrangement as a “win-win business deal,” consciously avoiding the moral language of previous administrations.

Trump's style — coercive, transactional, but ultimately pragmatic — proved effective precisely because it matched the hardened region's and geopolitical environment. With limited yet decisive leverage, Washington reinserted itself into the South Caucasus without assuming commitments it was not prepared to uphold.

Yet the arrangement is inherently precarious, personality-driven, not institutionalized. It relies on his sustained engagement and on his calculation that regional stability serves U.S. economic interests. A shift in focus, a Middle East escalation, a strategic crisis in East Asia, or even a domestic political diversion — could quickly deprioritize the South Caucasus. In that vacuum, Turkey and Russia would move to reassert influence, ready

to fill the void, each seeking to reshape the region in line with its own revisionist ambitions.

For now, however, the Trump-brokered framework has achieved, what decades of OSCE mediation and EU shuttle diplomacy could not: identifying mutually agreed path to peace combined with a freeze on conflict, a set of incentives parties agreed to work together, and the introduction of the South Caucasus into Washington's strategic field of vision.

The Regional Chessboard: Shifting Balance of Power

The past year has produced tectonic shifts across the Middle East and the South Caucasus. Across Armenia's immediate neighborhood, several developments have fundamentally changed the landscape. Israel's back-to-back victories — destroying Hamas's military command in Gaza, degrading Hezbollah's forces in Lebanon. It all combined with the collapse of the Assad dynasty in Syria in December 2024 — have upended the Levantine power structure. Iran and Russia lost their long-standing foothold in Syria while Turkey emerged as a primary architect and beneficiary of Assad's removal. The 12-day Israeli -Iran war in June 2025, combined with strikes on nuclear facilities — join by the United States — crippled Iran's nuclear infrastructure and shattered its deterrent capacity significantly. Georgia's drift back to Russian sphere accelerated, Azerbaijan's with a renewed confidence made one more push for emancipation from Russian tutelage.

Two actors moved fastest: Azerbaijan and Turkey. Bound by the slogan “two states, one nation,” they see the evolving realities as one more opportunity to reinforce the alignment both in strategic terms and operational. Joint military exercises, intelligence sharing, and coordinated diplomacy underpin a coordinated bid to reshape the South Caucasus. Turkey's Middle Corridor — linking China to Europe via Central Asia and bypassing Russia and Iran — embodies Ankara's ambition to become a central actor in Eurasian connectivity. Azerbaijan, empowered by military victories and energy diplomacy, seeks to convert its battlefield success into a dominant regional position.

Azerbaijan moving from Russian vassal state to a perceived Regional Power. It has taken deliberate steps to distance itself from Russia and reposition itself as a

regional hegemon. Military victories against Armenia, deepening strategic alignment with Turkey, expanded energy diplomacy with Europe and Central Asia, and calibrated engagement with Israel have created a new multi-vector policy aimed at maximizing leverage. Baku increasingly acts as a power center and seeks to shape regional transport corridors, energy routes, and security arrangements without Moscow's approval.

Georgia: A Strategic Drift. Georgia's political trajectory has shifted towards Russia, with the government cooling its Euro-Atlantic ambitions and slowing EU integration. This affects Armenia directly. Tbilisi has been Armenia's primary gateway to Europe, NATO-linked logistical networks, and Western markets. Any Georgian drift toward Moscow introduces new vulnerabilities for Armenia's trade, transport, and security arrangements.

A Georgia less aligned with the EU and more sensitive to Russian pressure becomes less predictable as a corridor state. It may restrict transit to Armenia when Russian interests demand it or disable Azerbaijani Turkish strategic initiatives on regional connectivity.

Rivalry of Victors. Turkey and Israel, have each emerged as regional victors with expanding spheres that now overlap. Both supported Azerbaijan militarily or politically during its campaigns against Armenia, yet their strategic agendas diverge sharply in post-Assad Syria and across the Eastern Mediterranean. Ankara is pushing for dominance in Syria, while Israel, by contrast, views Syria primarily through the lens of suppressing any future Iran-linked militia ecosystem. This sets up potential friction over reconstruction contracts, gas transport routes, intelligence presence, and access to Mediterranean basins.

Iran's Erosion: A Difficult but Indispensable Neighbor. Iran's strategic position has deteriorated sharply. For the first time in decades, Iran's entire proxy architecture from Beirut, Damascus to Sana has been fractured. For Armenia, Iran's weakening removes a counterweight that, despite its complications, had historically constrained Turkic hegemony in the South Caucasus.

Iran, though strategically important to Armenia, is not an easy and predictable ally for Armenia. Aligning too closely with Iran risks alienating Western backers and entrenching Armenia further in a volatile regional balancing act. Tehran's internal fragility and external isolation limit what it can offer beyond limited trade corridors and energy exchanges. The prudent course is calibrated pragmatism: maintaining access and dialogue without strategic dependence.

Russia: Decline or Pause - possible Return? Russia has been totally absorbed by the war in Ukraine from 2022 and was left with almost no oxygen to continue playing the power broker role in South Caucasus and the Middle East. The collapse of its peacekeeping mission, its complete passivity during the ethnic cleansing of Nagorno-Karabakh, and its retreat from Armenia's security commitments have destroyed its credibility among the Armenian public.

However, the recent US policy shift vis a vis Russia gave a new breathing to Russian ambitions. It seems US is more flexible and willing to accommodate the Russian nostalgic feelings for dominance in post-Soviet space. A potential resolution in favor of Russian demands in the Ukraine war could open the space for Russia reasserting its influence in the South Caucasus and Central Asia as well.

For Armenia, this is a double-edged scenario. A resentful but weakened Russia may again demand loyalty without delivering security. A stabilized Russia, however, might limit Azerbaijani and Turkish assertiveness for its own strategic reasons. Armenia's margin of maneuver depends on whether Yerevan secures meaningful Western and regional partnerships before that window closes.

Azerbaijan's Drive to Exploit Global Turbulence

Azerbaijan's victory in Nagorno-Karabakh was not a conclusion but an inflection point in a longer campaign. Baku has deliberately pursued for a while what can be called "scrolling aggression" — continuous, calibrated escalation designed to shift facts on the ground while avoiding steps dramatic enough to trigger strong Western intervention. The pattern was incremental but cumulative, and it is far from over.

Azerbaijan's strategic behavior since 2020 victory reflects a calculated effort to reshape the regional balance through gradual, cumulative coercion. Unlike sudden large-scale offensives that trigger international scrutiny, Baku's method has been calibrated to remain just below the threshold of Western reaction. In September 2022 it assaulted Armenia proper, capturing 240 square kilometers before U.S. pressure halted the advance. Later in September 2023 it launched a final attack on Nagorno Karabakh that ethnically cleansed the region of its 120,000 indigenous Armenians.

This approach was enabled by favorable geopolitical moment. Europe's dependence on Azerbaijani gas created an environment in which European institutions were reluctant to confront Baku. Azerbaijan's sophisticated lobbying networks in Western capitals reinforced this environment, enabling Baku to present its actions as pragmatic, inevitable, or aligned with Western strategic interests.

Baku's victory in Karabakh emboldened its ambitions. From Victory to higher ambitions and next Aliyev started a quest for an even bigger prize: the "Zangezur Corridor". Azerbaijan sees it as a critical trade route between its Turkey and Central Asia, as well as important lifeline for Nakhijevan. At the same time "Zangezur Corridor" rhetoric was used also as a pretext for coercion, with focus on expansion and farther dominance. Aliyev knew his military and economic superiority will not last forever and viewed the next few years as a critical window to act before Armenia start closing the gap.

Till August 8th, 2025, Aliyev's approach was mostly shaped by four key factors.

1. **Internal Politics and State-Driven Armenophobia.** Decades of state propaganda have created massive public expectation for revanche. Armenophobia became a political resource. Aliyev relies on it to reinforce his authoritarian rule, deflect attention from domestic social and economic vulnerabilities, feeding national pride and legitimize expansionist policies.
2. **Fear of Relative Decline.** Azerbaijan's economy is near its historical peak due to sustained oil and gas income and reserves. SOFAZ(State oil Fund of Azerbaijan) assets reached approximately \$70 billion by September 2025, and combined with Central Bank reserves, Azerbaijan's total national reserves approach \$80–82 billion. Its 2026 defense budget is \$5.1 billion, dwarfing

Armenia's ~\$1.44 billion allocation. Yet beneath this strong financial position, Azerbaijan's hydrocarbon sector, the backbone of its state power, is entering gradual decline. Oil production has fallen from around 50 million tons in 2010 to 30 million in 2025. Gas exports, though politically important, lack the capacity to offset the structural downward trend. By 2035, even optimistic models anticipate plateauing followed by decline. Meanwhile, Armenia's economic trajectory has diverged significantly. From 2021 to 2024, Armenia posted some of the fastest per capita GDP growth rates in Eurasia, driven by hi-tech expansion, immigration of skilled labor, investment and tourism. According to IMF, Armenia's 2025 GDP per capita is \$8,900, compared to Azerbaijan's \$7,200, a reversal of the gap that once favored Baku. If these structural trends persist — analysts project that Armenia's per capita GDP could potentially double or even triple Azerbaijan's within the next 15–20 years.

3. **A Global Environment Where Might Makes Right.** The international system is in a Hobbesian state. Russia's invasion of Ukraine, and Trump's renewed embrace of transactional power politics have normalized coercive behavior. Up to some point the cost of aggression was low, the appetite for Western deterrence was weak.
4. **A Calculated Diplomatic Posture Toward the West.** Unlike Putin or Lukashenko, Aliyev carefully maintains channels to Western elites. He appears at Davos, Munich, and other high-level forums; signs energy deals with the EU; and presents himself as a pragmatic, modernized autocrat.

TRIPP (Trump Route for International Peace and Prosperity). August 8, 2025, Summit was the most significant diplomatic breakthrough in the South Caucasus since the 1994 ceasefire. The centerpiece was the Joint Declaration formally titled "On the Establishment of Peace and Interstate Relations between the Republic of Armenia and the Republic of Azerbaijan." signed by Prime Minister Nikol Pashinyan and President Ilham Aliyev, with President Donald J. Trump acting as witness. The declaration states: "The Republic of Armenia will work with the United States of America and mutually determined third parties to set forth a framework for the 'Trump Route for International

Peace and Prosperity' (TRIPP) connectivity project in the territory of the Republic of Armenia.

In parallel, the foreign ministers initialed a 17-article Peace Agreement, pending final signature and ratification in both countries. This framework establishes the legal basis for interstate relations, border delimitation, unimpeded communications, and mutual recognition of sovereignty.

The summit also produced four bilateral memoranda with Washington. Armenia signed three—on border and customs security, energy diversification, and collaboration in AI and semiconductor innovation. Azerbaijan signed one, establishing a working group to negotiate a Charter on Strategic Partnership, effectively mirroring Armenia's earlier Strategic Partnership Charter with the U.S. signed in January 2025 under the Biden administration.

Washington's effort was to transform Azerbaijan's earlier coercive "corridor" demands into a connectivity arrangement that preserves full Armenian sovereignty, international oversight, and legal guarantees. President Trump waived Section 907 of the Freedom Support Act, allowing U.S. military assistance to Azerbaijan for the first time since 1992 (Federal Register, 2025) as an incentive for compliance, paired with implicit warnings that renewed aggression would trigger immediate reinstatement of restrictions.

If TRIPP is implemented quickly, it will generate meaningful dividends for Azerbaijan:

- new transit revenues,
- deeper economic ties to Turkey and Central Asia,
- geopolitical prestige as a regional connector.

Under such circumstances, Aliyev has strong incentives to maintain a peace posture, as stability becomes economically and diplomatically profitable.

Azerbaijan's broader ambitions remain unchanged: to consolidate its role as a critical Eurasian transit state, connecting: Central Asia → Caspian → Azerbaijan/South Caucasus → Turkey → Europe, while reducing dependence on Russian or Iranian-controlled routes, and to maintain military dominance over Armenia.

TRIPP aligns with this strategy but only if implemented efficiently. If it succeeds, stability serves Baku's interests. If it falters, the probability of renewed Azerbaijani coercion rises proportionately.

Turkey's Rising Ambitions in a Collapsing World Order

Once reliant on the Western security umbrella to counterbalance Soviet and later Russian pressure, Turkey now operates in a world where the rules are being rewritten. The erosion of the post-Cold War order—weakening international institutions, fractured alliances, Russia's war in Ukraine, chronic Middle Eastern turbulence, and the disruptive posture of the Trump administration—has created a permissive environment for ambitious middle powers. Under President Recep Tayyip Erdoğan, Ankara has expanded its influence from the South Caucasus and Libya to the Horn of Africa and Central Asia, pursuing a multidirectional foreign policy blending military assertiveness, ideological framing, and transactional partnerships. No longer a peripheral NATO actor, Turkey increasingly positions itself as a revisionist regional pole with global reach.

Erdoğan's leadership, marked by assertive nationalism and opportunistic foreign policy, has decisively broken with the era in which Turkey played a secondary role within Western structures. Turkey's growing distance from its traditional allies and its cultivation of partnerships with major regional actors—including Russia, Qatar, and other authoritarian governments—signal the emergence of a more unpredictable geopolitical chapter.

Balancing Between Moscow and the West. Turkey's special relationship with Russia illustrates Erdoğan's dual-track strategy. Cooperation and competition coexist: Moscow and Ankara explore joint economic projects, and engage in energy partnerships, yet they backed opposing sides in Libya or Syria and maneuver for influence in the South Caucasus and Central Asia. Ankara's 2019 purchase of the Russian S-400 air defense system marked a clear challenge to NATO and an assertion of strategic autonomy.

Since Russia's full-scale invasion of Ukraine, Turkey has maintained formal support for Ukraine's territorial integrity—including early drone deliveries—while simultaneously preserving dialogue with the Kremlin. Ankara also retains the historical memory that

Crimea was once part of the Ottoman Empire, a subtle factor shaping long-term strategic thinking. This calibrated posture has allowed Turkey to play a role of mediate in prisoner exchanges, facilitate grain-export arrangements, and benefit from wartime trade realignments.

A Strategic Pivot Enabled by Systemic Turbulence. Russia's overstretch in Ukraine, Iran's setbacks, Gaza, Europe's internal divisions and indecisiveness, and Washington's shift toward transactionalism—has allowed Turkey to expand its influence across multiple frontiers. The paralysis of the UN Security Council, NATO's internal strains, and fading EU leverage—has generated strategic openings requiring neither permission nor consensus. Erdoğan's foreign policy, sometimes described as neo-Ottoman, is best understood today as opportunistic expansionism.

Syria, the collapse of Assad's regime. The December 2024 fall of the Assad regime fundamentally reshaped the Levant. Ankara's long-standing relationships with Syrian opposition groups, and its ambivalent ties with Hay'at Tahrir al-Sham, enabled it to shape the post-Assad landscape more effectively than any other external actor. Turkey now exerts influence over security structures, administrative arrangements, and economic networks in northern and central Syria.

Expanding Footprint in North and East Africa. Turkey has consolidated its influence in Libya, where support for the Government of National Unity (GNU) shifted the balance against UAE- and Russia-backed forces. This intervention has provided Turkey with privileged access to Mediterranean energy assets and strengthened its leverage in maritime disputes.

In the Horn of Africa, Turkey continues to enlarge Camp TURKSOM in Somalia and has expanded security cooperation with Somali federal forces. In Sudan, Turkish drones and advisers supported Sudanese Armed Forces in recapturing Khartoum in mid-2025, reinforcing Turkey's growing profile in the Red Sea corridor.

Turkey's Strategic Launchpad. In the South Caucasus, Turkey's ambitions are most conspicuous. Its support for Azerbaijan in the 2020 war and subsequent conflicts transformed regional military balances. Turkey's defense industry — particularly drone technology — played a decisive role in enabling Azerbaijani successes. Turkey is not

merely a supporter of Azerbaijan; it is a co-architect of a new regional order that seeks to reduce Armenian sovereignty, constrain Iran, bypass Russia, and connect Central Asia to Europe through Turkish-led routes.

Turkey's Rising Profile in U.S. Diplomacy. Despite enduring strategic divergences, Ankara has positioned itself as an indispensable interlocutor for Washington. Turkey played a visible role in the 2025 Gaza stabilization framework and did the unthinkable forcing Hamas to release prisoners. At the Sharm el-Sheikh Summit in October 2025, Erdoğan was among the signatories endorsing the Gaza governance mechanism. During the press conference, President Trump described Erdoğan as “a strong leader who gets things done and can deliver results in a tough neighborhood.” It reinforced the view that Washington sees Turkey as a necessary regional problem-solver and enforcer.

Turkey's Ambition Limits. The primary constraint on Turkey's ambitions is economic fragility. High inflation, currency volatility, structural imbalances limit the level of Turkish power projection. But economic weakness does not diminish ambition; it often accelerates it, as external successes become a tool for domestic legitimacy. Turkey's leadership views geopolitical activism as both a national mission and a means of rallying domestic support in times of economic strain. Potential Russian resurgence could challenge Turkey's expanding influence in the South Caucasus and Central Asia.

Armenia's Strategic Crossroads

2025 August 8 Summit produced an alignment of interests favorable to Armenia. The threat of imminent Azerbaijani aggression has receded, and diplomatic engagement with the United States, the European Union, and India is expanding. Yet this moment is neither secure nor indefinite. Armenia stands at a strategic crossroads, with the next three years likely to determine whether it emerges as a resilient democracy with diversified partnerships or remains vulnerable to coercion. Armenia's long-term survivability requires a strategy grounded in pragmatic resilience — the ability to absorb shocks, deter coercion, and leverage opportunities while maintaining the flexibility to maneuver diplomatically.

Democracy as Leverage. Despite its vulnerability, Armenia retains one structural advantage: its democratic identity. Free elections, a competitive political system, active civil society, free media, and a reform-oriented governance agenda distinguish Armenia from the sea of tyranny it is surrounded. These attributes offer diplomatic capital, particularly in Europe. However, the assumption that democratic credentials would translate automatically into Western protection has proved overly optimistic. Great powers reward strategic utility, not virtue, and Armenia's experience since 2020 has exposed the gap between normative alignment and hard security commitments.

The Strategic Pillars of Pragmatic Resilience. To survive in an increasingly lawless international system, Armenia must pursue a strategy of **pragmatic resilience**—internal consolidation combined with external diversification.

Accelerate Military Reforms: Defense modernization.

Armenia cannot outspend adversaries, but it can asymmetrically complicate aggression. Unmanned aerial systems, counter-battery radars, electronic deception tools, and high-mobility artillery platforms can create an environment in which any military incursion becomes costly, slow, and politically unattractive for Azerbaijan. This could also extend to information security, cyber defense, and the protection of critical infrastructure, all of which are increasingly central to contemporary deterrence. Also, Armenia:

- must shed its Soviet era rigid mentality and command structure of the armed forces,
- complete territorial-defense restructuring,
- develop a professionalized reserve modeled on successful small-state examples.
- integrate advanced surveillance, counter-drone, and precision-strike systems,
- deepen fortifications and electronic warfare capabilities.

2. *Effective Engagement with Washington.* **August 8th, 2025, Washington Summit** elevated Armenia's strategic profile, offering a rare combination of incentives and conditional guarantees but did not produce formal defense guarantees. The United

States signaled that both Armenia and Azerbaijan would receive tangible economic and political benefits—**the carrot**—so long as they adhered to the peace framework. For Armenia, this meant U.S. backing for sovereignty over transit routes, support for economic modernization, and access to investment and technology partnerships. The United States will not defend Armenia automatically, but it will deepen cooperation with a partner that advance shared aims.

Armenia must show that its stability contributes to broader U.S. interests — including countering malign regional actors, reinforcing democratic resilience along Russia’s periphery, and supporting East–West connectivity. Timely TRIPP implementation and reasonable joint arrangements to keep USA parties engaged, reinforcing Armenia’s role. If implemented effectively, TRIPP could create shared economic incentives that stabilize the Armenia–Azerbaijan relationship by embedding both countries within a broader, internationally supervised connectivity framework. Armenia would gain diversification of trade routes, increased Western involvement, and reduced risk of conflict tied to transit disputes.

If implementation falters, it may generate new vulnerabilities. Any ambiguity in implementation could be exploited by Azerbaijan to revive territorial claims or exert pressure under the guise of technical disputes. Governance mechanisms must therefore be transparent, enforceable, and supervised by credible international actors. The pace of financing, construction, and political oversight will determine whether TRIPP becomes a stabilizing force or a new arena of contestation.

3. *Deepening European Integration* — has gained momentum as the EU assumes a more prominent role in Armenia’s political and economic life. The new Strategic Agenda for the EU–Armenia Partnership, signed on December 2, 2025, outlines cooperation in rule of law, justice reform, human rights, socio-economic development, digital transformation, and energy diversification and most importantly **security and defense**. For Armenia, this framework provides not only technical assistance but also political anchoring.

The EU’s “Resilience and Growth Plan” for Armenia creates pathways for investment, modernization, and infrastructure development. Visa liberalization would unlock

mobility for Armenian citizens and accelerate integration with European markets and institutions. Bilateral defense cooperation — increasingly visible with France, Germany, Greece and more — signals an important shift. While the EU cannot replicate NATO security guarantees, individual member states can help transform Armenia’s defense posture. Armenia must use this momentum to institutionalize reforms that strengthen transparency, rule of law, reduce corruption, conducive business environment, innovation-driven economic growth, and align regulatory frameworks with EU standards.

4. *Maintaining Open Channels with Moscow and Tehran* — is a pragmatic necessity. Despite Russia’s loss of credibility as a security guarantor, it remains a major actor in the region with the potential to reassert influence. Depending on how the Ukraine conflict evolves, Moscow may regain leverage in the South Caucasus. Armenia must avoid an abrupt rupture that could provoke punitive behavior from a resentful power. Instead, it should maintain functional ties, focusing on trade, labor migration, and limited political dialogue. Russia’s future posture is uncertain; Armenia must preserve optionality.

Iran, for its part, is both indispensable and unpredictable. With Turkey and Azerbaijan aligned in an assertive regional axis, Iran remains the only southern outlet not dominated by hostile powers. Yet Tehran’s internal fragility, international isolation, and diminished regional influence limit its capacity. Armenia must maintain calibrated pragmatism: enough engagement to preserve access, but without drifting into strategic dependence that would alienate Western partners. Balancing between Washington and Tehran will remain one of Armenia’s most delicate diplomatic tasks.

5. *Economic Resilience and Defense Industrial Development* — is critical for long-term strategic autonomy. Armenia’s economic transformation since 2021 has been driven by technology, innovation, human capital inflows, and diversification. This momentum must be converted into sustainable industrial capacity, including domestic defense production. Armenia’s emerging ecosystem of R&D centers — including activities by NVIDIA, AMD, Synopsys, National Instruments, and new Firebird AI data processing center — offers an opportunity to create dual-use technologies that support both economic growth and national defense. Armenia can become a regional leader in AI-

enabled defense tools, semiconductors, robotics, areas where size matters less than creativity and technical skill.

Defense industrial development is not merely about producing equipment; it is about embedding Armenia within a global network of suppliers, innovators, and co-development partners. Joint ventures with France and India defense firms could reduce dependence on unpredictable suppliers and give Armenia bargaining power. The goal is to create a virtuous cycle: economic growth supporting national security, and national security enabling a stable environment for growth.

6. *Narrative Warfare* — is often overlooked but increasingly decisive. Azerbaijan has invested heavily in shaping global perceptions, using public relations firms, lobbying networks, and strategic communications to frame its actions as justified, inevitable, or misunderstood. Armenia's response has been fragmented and reactive.

Armenia needs a coordinated strategic communications effort to expose coercive diplomacy, highlight democratic progress, and explain the regional implications of aggression. A compelling narrative must connect Armenia's experience to global concerns: the erosion of international norms, the dangers of unchecked revisionism, and the vulnerability of small democracies. Diaspora communities — highly educated, influential, and globally dispersed — should be mobilized systematically to support this effort. Narrative warfare does not replace diplomacy or deterrence, but it amplifies both.

Conclusion

Armenia stands at a rare juncture: vulnerable yet but facing new opportunities, isolated yet increasingly visible, pressured yet capable of redefining its geopolitical posture. The direction it takes now will shape the country's sovereignty for the coming decade. Armenia cannot afford complacency: this is a moment requiring strategic clarity, accelerated reform, and diplomatic agility.

Armenia's fate is not just a nation's concern — it is a test case for the future of the international order and whether any space remains for small, democratic nations to chart their own course.

Armenia also needs to confront hard truths: the West may never fully embrace Armenia as a strategic ally. Deterrence may need to come from internal strength and regional diplomacy, rather than outside guarantees.

Whether Armenia survives this crucible will depend not only on its ability to adapt, but also on whether others finally recognize its strategic and symbolic significance.

The world, distracted by bigger conflicts and more visible crises, has largely overlooked Armenia's transformation. But what is unfolding in Yerevan is not just the realignment of one small country. It is a warning shot for the rest of the world: alliances are crumbling, order is unraveling, and small states are once again becoming pawns in larger games.

A General Perspective

Artin DerSimonian and Anatol Lieven

The South Caucasus is experiencing significant upheavals—not unlike the international system itself. Changes at the international, regional, and local levels are reverberating across Armenia, Azerbaijan, and Georgia. Navigating such a maelstrom will be no easy feat. To survive is already a success in itself; to thrive will require the kind of sophisticated statesmanship far too often lacking in the South Caucasus.

While claims of an approaching multipolar world are rife, the reality is far more nuanced. The post-World War II international order is indeed fraying bit by bit and day by day, leading to an increasingly fragmented international order with no clear alternative in sight. The purported existence of multiple genuine “poles” in the system, however, is overstated.

The U.S., for decades seen as the unquestioned superpower, is indeed facing the twin challenges of a more competitive international landscape and a fractious domestic political environment. At home, the American public, itself largely polarized and facing yawning inequalities, expresses deep skepticism of further engagement in foreign entanglements. Internationally, America is facing challenges it cannot address on its own while concurrently attempting to reconfigure relations with its historic allies and partners to better serve the needs of today.

Nevertheless, the U.S. remains the largest economy (in \$ terms) and continues to significantly outspend its nearest competitors on defense. However, decades of perceived overextension have exhausted large parts of the American public who have seen their own prosperity decline as their government prioritized faraway causes. The upending, trailblazing foreign policy of the second Trump Administration is a symptom of these changes, not their cause.

The other aspiring centers of power in this post-unipolar system are facing their own challenges, calling into question their ability to genuinely claim the mantle of a power center on par with the U.S.

Recent Russian actions, purportedly directed toward the cause of establishing a multipolar world, have given some credence to former President Obama's pejorative statement that "Russia is a regional power that is threatening some of its immediate neighbors". To be sure, Russia has broad and ambitious interests and significant capabilities to support them, not least among them its impressive reserves of natural resources, territorial expanse, and massive nuclear arsenal. However, as the Ukraine War enters its fifth year, Russia's military imbroglio in the east and south of that country has dramatically limited its ability to act in defense of its allies and partners and maintain a 21st century economy without significant external support. In addition, many of Russia's neighbors have become increasingly wary of Moscow and more eager to diversify their foreign policy and economic ties away from Russia. Without a negotiated end to the Ukraine War and a gradual normalization of relations with the U.S. and Europe, Russia will continue to struggle to preserve its power not only globally, but likely along its periphery too.

The EU has similarly staked a significant part of its own strength as a Great Power on the outcome of the Ukraine War. Its continued and largely unquestioned support for Ukraine has become a rallying cry for elites across the continent who strive for unity above all else. However, the economic challenges confronting the Bloc, stemming in part from sanctions imposed on Russia and which have played no small part in elevating populist political parties across the continent, have been largely left unaddressed. While these parties no longer wish to destroy the EU, most of them are determined to curtail its centralized powers.

Indeed, an increasing belief in a form of military Keynesianism as the key to revitalizing the EU's prosperity is shared across the Union ironically once described as a peace project. The divisions that were visible already a decade ago throughout the EU are only growing, and are unlikely to go away if they remain unaddressed. Any attempt at grappling with these domestic challenges will be helped by both a satisfactory end to the Ukraine War and a stabilization in relations with Russia, the latter of which, as of now, seems a tall order for Europe's current elites. Fundamentally, if the EU wishes to become a center of real power on the global stage, it must strengthen its autonomy and better align its interests with its capabilities.

While India, with its growing population and stable economic development, is seen as an undoubted rising great power, it faces key limitations of its own. Its present underdevelopment of human capital and state capacity make it unlikely to become a true global power, at least for the foreseeable future. While it has overtaken China to become the world's most populous country, its GDP per capita in 2024, at \$2,694, is only a fraction of China's \$13,303—let alone America's \$84,534. In the broader South Asian context, however, India certainly has the strength and capacity to play an important role, as it increasingly is doing.

China, meanwhile, is seen as the true rising challenger to American preeminence. While the Chinese, of course, face many challenges of their own, not least among them an aging and declining population and sluggish economic growth, they remain a key challenger to the U.S. Excelling across the most critical of domains and with several globally-oriented initiatives, Washington has framed Beijing as its long-term pacing challenge. As China continues to transform its economic strength into military might, the competition between Beijing and Washington will dominate the modern international system.

The aspiring great powers and their middle power cousins will, undoubtedly, have a role to play in shaping a future order, but no other state matches the strengths commanded across the entire spectrum by China and the U.S.

The South Caucasus, interestingly enough, is located geographically almost precisely in between Beijing and Washington. Situated along the strategic crossroads between the Eurasian heartland, the Middle East, and Europe, the South Caucasus is unlikely to avoid becoming entangled in the brewing competition. Therefore, how the three countries of the region play their hand in the coming years is likely to prove fateful.

When speaking of the wider South Caucasus region, the conversation has often been limited to Iran, Russia, and Turkey. This is no longer the case. While the three former empires continue to play an outsized role in regional affairs, the South Caucasus has become more interwoven with the wider Middle East, Central and South Asia, and the European continent. These changes present both alluring opportunities as well as perilous tests for the three young republics.

The changing landscape of the last several years has proven largely beneficial to Turkey. Azerbaijan, Ankara's strategic partner in the region, succeeded between 2020-23 in recovering its once occupied territories and gaining overt military superiority over Armenia. Turkey's traditional rival in the region, Russia, has faced repeated setbacks and diminutions of its power, largely but not only due to the Ukraine War. Turkey's relative autonomy and military strength offers it a not insignificant card to play in negotiations with an EU presently confronted by its own weaknesses. New connectivity projects offer Ankara ample opportunity to take advantage of increased investment and international attention, while advancing its own strategic interests. Nevertheless, Turkey's muscular foreign policy over the last decade and a half has saddled it with burdens along its entire periphery. Navigating this complex web while delivering successes in the South Caucasus will require delicate and deft management from Ankara.

Iran has been distracted and weakened over the last several years by its confrontation with Israel and the U.S. Nevertheless, it maintains core strategic interests in the South Caucasus that the region's states would be wise to recognize and respect. It has, after all, been around in the region for a lot longer than the U.S.. The Trump Route for International Peace and Prosperity (TRIPP) provoked a particularly sharp response from certain segments of the Iranian elite. Continuing to manage the relationship with Tehran and its specific concerns regarding TRIPP will, therefore, be an essential component of Yerevan's regional policy in the years ahead.

Russia, long the dominant actor in the region, has lost much of its former clout. A combination of the military quagmire in Ukraine, a lack of strategic foresight, inability to successfully counterbalance competitors' ambitions, and a somewhat pervasive misunderstanding of the region's own local politics have contributed to this deterioration in power and influence. Nevertheless, Russia remains a significant actor in the South Caucasus and possesses tools to advance its own interests, or at the least to thwart attempts aimed at rolling them back. History has shown that when Russian power has been weakened in the South Caucasus, it has found new ways of reasserting itself. Whether that will be the case today remains to be seen.

The announcement of the TRIPP last August at a White House ceremony introduced a wildcard into regional affairs. The proposed route, to be built by a U.S.-Armenia joint venture is expected to play a key role in unblocking long-closed regional communications between Armenia and Azerbaijan (and, by extension, Turkey too), not only road and rail but energy and digital infrastructure as well. Importantly, the TRIPP will offer an additional route to connect the Far East and Central Asia with Europe through the South Caucasus and Turkey. For the U.S., the agreement not only offers the chance to highlight President Trump's peacemaking aspirations, but also to deliver geopolitical and geoeconomic dividends to Washington in the years ahead. Nevertheless, managing Russian and Iranian skepticism and unease at the prospects of an increased American role in the region will be a crucial factor in assessing the TRIPP's future success. If this is achieved, and TRIPP is able to produce mutually beneficial advantages to both Armenia and Azerbaijan, the project may prove to be a foundational component in a long-sought, sustainable peace.

Armenia, Azerbaijan, and Georgia have each had a whirlwind of a decade thus far. The reverberations from the changes on the international and wider regional levels have produced both opportunities and challenges for the three South Caucasian republics. Navigating these stormy conditions will demand clarity of purpose alongside a sophisticated understanding of what is driving these winds of change.

For Georgia, while the challenges are undeniably numerous, there are indeed opportunities—however murky they may appear at present. As the ruling Georgian Dream party continues its domestic clampdown in an effort to centralize power, it is concurrently pursuing an, admittedly, shoddy effort at a multidirectional foreign policy. While Tbilisi lacks many of the assets that has permitted Baku to pursue such a strategy over the decades, Georgia may be able to leverage its strategic location and still-impressive transparency and ease of business rankings for attracting significant investment and engagement from abroad. The reality that the Georgian ruling elite ought to recognize is that they are not as strong as they think themselves to be. For Georgia's heretofore partners in the West, however, they would do well to remember that Tbilisi is not as weak or isolated as they think either.

In Azerbaijan, strategic success on the battlefield has washed away earlier stains of weakness and defeat. Winning, or at least not losing, the peace will be equally important. Baku has developed a battle-tested, modern armed forces and has coupled that with impressive economic spoils and widespread diplomatic engagement. Preserving these feats—and building upon them—will remain a key driver of Azerbaijani policy in the region and beyond. Transitioning from an era of brewing hostility to one of looming calm is a challenge in and of itself. Overseeing that metamorphosis while ensuring continued national wealth and domestic stability is sure to focus the minds of policymakers in Baku. They will need to remember that their present reserves of oil and gas will not last forever.

For Armenia, the fundamental necessity is the preservation of the state and improvements to its security and prosperity. Achieving these objectives amidst a polarized domestic political environment and surrounded by an improving but still fragile regional security architecture will require the kind of nuance that has often evaded Yerevan's present leadership. Equally important will be the ongoing strategy of balancing and diversifying foreign relations. Armenians should be wary of fleeing the embrace of Russia only to fall into dependence on a United States whose long-term commitment to the South Caucasus—and even to Europe—is uncertain. For Yerevan's approach to succeed, a clear-headed recognition of its limits is essential, for only then can Armenia pursue incessantly that which is possible and fruitful. As Henry Kissinger once wrote, "Statesmen, even warriors, focus on the world in which they live; to prophets, the 'real world' is the one they want to bring into being."

America Pivots to the South Caucasus: The Washington Accords, Regional Interconnectivity, and Armenia's New Security

Dr. Nerses kopalyan

In early March of 2026, U.S. intelligence as well as numerous officials had ample evidence to warn the White House that [Azerbaijan was planning on reinitiating hostilities](#) against Armenia, with deep concerns that incursions into southern Armenia would likely materialize. U.S. officials undertook a flurry of activities to curtail Baku's objectives, initiating shuttle diplomacy of sorts between Yerevan and Baku. In early May, the American team produced a proposal to both sides which would become the foundational basis of the [Washington Accords](#). The Washington Summit held on August 8, 2025 at the White House between Prime Minister Pashinyan, President Trump, and President Aliyev was the culmination of this normalization proposal and months of negotiations between the three sides.

Washington Accords, TRIPP, and America's Pivot to the South Caucasus

At the heart of the normalization process, from its inception, was the American belief that unless connectivity is established and the transit route issue addressed, [Baku will weaponize the so-called "Zangezur Corridor"](#) precept to relaunch hostilities. At the Washington Summit three documents were formalized. First, [a joint declaration](#) by Armenia and Azerbaijan, under the auspices of the United States, seeking full normalization of relations and permanent pathway to peace. Second, the foreign ministers of both countries [initialed the draft document](#) based on the agreed contours of the peace agreement, signifying commitment by both sides to adhere to the 17 articles of the draft agreement. Third, both foreign ministers jointly signed a document formally [withdrawing from the OSCE Minsk Group](#), noting the obsolete nature of the format.

At the bilateral level, President Trump and Prime Minister Pashinyan [signed numerous memorandums of understanding](#) to elevate the U.S.-Armenia partnership, which, in essence, is designed to not only quickly implement the agenda of the U.S.-Armenia Strategic Partnership, but also include initiatives to collaborate on artificial intelligence,

energy, mining, semi-conductors, security, and Armenia's Crossroads of Peace initiative. MOUs were also [signed between Azerbaijan and the US](#), though not at the same scope or depth as that between Armenia and US, considering that the latter are formal strategic partners, while formal bilateral relationship does not yet have such an elevated status.

The cornerstone of the Washington Accords was the Trump Route for Peace and Prosperity (TRIPP), a joint Armenia-U.S. venture designed as a master development plan to build a commercial route across southern Armenia. Conceding the fact that the term "corridor" has been politicized and weaponized by Baku and Russia's proxies in Armenia and the Diaspora, the project will only use the terms "road" and "route." TRIPP is envisioned as a vital and strategic trade artery that will be subjected to and administered by Armenian law, while operated under a joint Armenia-U.S. venture. Thus, TRIPP ensures Armenia's sovereignty, territorial integrity, and jurisdictional authority, while incorporating immense American investments, logistical support, and know-how.

TRIPP has been developed as an economic and commercial endeavor, not simply a geopolitical or hard power move, and it is for this reason that there will be no mechanisms of militarization in securing the route. While Azerbaijan had initially demanded complete unimpeded access of all cargo and goods passing through Armenia, without any inspection of the content included in the shipments, this maximalist demand was rejected. Rather, only commercial access will be permitted, and in this context, military equipment or non-commercial products will not be permitted under the TRIPP agreement. Further, since the control of the route will be under Armenian law, and thus, under Armenian control, cargo entering and passing through the Republic of Armenia will be subjected to inspection prior to entering Armenian territory. The specific contours of the TRIPP project, and America's long-term investment in this endeavor of making Armenia a regional transport hub, was confirmed on January 13, 2026 in the [signing of the TRIPP Implementation Framework](#) (TIF) between Foreign Minister Mirzoyan and Secretary of State Rubio.

TIF outlines America's 49-year commitment in the joint venture with Armenia through the formation of the TRIPP Development Company, with Armenia reserving full

sovereignty, jurisdiction, and legal authority over the entire project, including border inspections, customs duties, and security. At the substantive level, TIF envisions America's regional objectives of securing "open communication, trade, and connectivity in the South Caucasus to promote peace, stability, and prosperity in the region," as well as enhancing "market access and critical supply chains in the Trans-Caspian region." With respect to Armenia, the signed framework envisions the enhancement of "Armenia's role as a regional transit and economic hub," the goal of attracting foreign investment in Armenian infrastructure," "building institutional capacity in modern border management and trade facilitation," "generating sustainable revenue streams and off-take rights for Armenia," while strengthening the "strategic partnership with the United States" and facilitating regional integration and normalization." In the structure and design of TIF, not only does the United States substantiate long-term vested interest in Armenia, but more so, it becomes integrated into profit-sharing and commercial activities. Qualified systemically, TRIPP is not simply about a single road or a one-off initiative, but rather, a broad regional project based out of Armenia that will strengthen and enhance America's economic, geostrategic, and regional interests, while mutually aligning them with Armenia. In this context, the concrete outcomes from the Washington Accords are not ephemeral two or three year projects, but rather, long-term regional endeavors acutely positioned within the domain of securing America's strategic interests in both the South Caucasus and Eurasia.

America's New Role in Armenia's Security Architecture

The White House's thinking on the security environment in the South Caucasus has revolved around the "peace first" approach, where the conflict is removed from the battlefield space and the use of force is precluded, after which the normalization process proceeds. In this context, the US views any act of belligerence as an active assault against America's strategic interests in the region. Qualified within this framework, Azerbaijan understood that the US presence in the region has altered the dynamics which define conflict tolerance. It is precisely for this reason that there have not been any crossborder shootings or internecine violence, even at the level of localized operations, in the last two years. Simply put, Baku, which has a penchant for consistent destabilization activities and has demonstrated a doctrine of conflict-

persistence for at least the last two decades, has ceased any and all such activities in the last two years.

What is the causal factor? America's new presence as regional hegemon and its insistence of the "peace first" approach. Upon transitioning the conflict from the battlefield space and into the normalization sphere, the U.S. envisions a new South Caucasus, one defined by trade, stability and interconnectivity, which also includes the opening of borders with Turkey in the very near future. Namely, the opening of borders with Turkey, and the activation, for example of the Gyumri-Kars railway, is not simply about Armenia-Turkey relations, but just as importantly, it is vital to America's new vision and its vested interests in the region. In this context, the overarching American approach can be defined by categorically denying Baku the option of using force, offering creative (economic, energy, infrastructure, etc.) incentives to both sides to make certain they adhere to U.S. objectives, and use these developments to formalize a normalization framework that, by 2028 (end of the Trump term), will lead to the signing of a final peace agreement.

For Armenia, the U.S. hegemonic presence in the region is not only a highly-preferable outcome for its Western pivot and policy of diversification, but more specifically, this development has fundamentally altered its security architecture. The joint U.S.-Armenia venture in building TRIPP, for official Yerevan, is not, in and of itself, only an economic or commercial endeavor, but just as, if not more importantly, an important layer of robust deterrence against any future acts of Azerbaijani aggression. Within the domain of security, TRIPP offers Armenia an expansive and multilayered framework of soft deterrence, which exponentially diminishes the threat propensity within its security environment. In essence, whereas the threat of Azerbaijani incursions were a continuous and high-probability threat since 2020, that threat has exponentially been diminished by virtue of the U.S.-led normalization initiative and the development of the TRIPP project.

In the domain of tactical deterrence, America's vision of undertaking a multi-year process of finalizing a peace treaty has extensively handicapped Aliyev's capacity to tap into his hybrid warfare toolkit. While Baku, for tactical and strategic reasons, will still seek to utilize certain methods of operational hybridity, it will, nonetheless, be

unable to utilize its wide-ranging toolkit the way it has for the last five years. Within the confluence of such developments, Aliyev's penchant for relying on kinetic and coercive diplomacy has also lost efficacy, since the theater of conflict has been transferred to a normalization format with U.S. strategic interests and investments present.

In no uncertain terms, the normalization process has brought about for Armenia a state of *de facto* peace, and while a peace treaty, if achieved in the future, will produce a *de jure* outcome, the more important variable, in the immediate and near future, is that Aliyev's war machine, which has fed off of the power disparity with Armenia, will have to go into hibernation. What the U.S. normalization initiative has done for Armenia's security architecture is quite unique: it has given Armenia a transit route that it controls, not the Zangezur Corridor that the Aliyev regime sought, while at the same time strengthening Armenia's position as a regional actor. Implicit in America's approach to the security environment in the region is the clear understanding that whether Aliyev wants peace or not is a secondary question. Rather, it is the implicit understanding that the contours of the region's dynamics have changed with the entry of the U.S. as the dominant regional actor. As such, Aliyev agreeing to the Washington Accords, for example, was an act of strategic adaptability, and not some newfound penchant for peace and stability. He understood the paradigm shift, and grasping the losses he would accrue if he stuck with his maximalist posturing, he demonstrated flexibility and compromise.

In this context, the alignment of US-Armenia interests, and the long-term investments that the United States has and is making in Armenia (as an extension of its new regional policy), the contours of TRIPP are not a temporary US policy, but an institutionalized grand strategy. Gauged within this framework, and as presented and qualified by the US foreign and security establishment, TRIPP is not a temporary endeavor, and as such, the economic, geostrategic, and tactical deterrence dividends that Armenia accrues from this development is also not temporary and purely predicated on a 3 or 5 year framework.

Conclusion

In the extant literature on peace studies, there are two comprehensive theories of peace: negative peace and positive peace. Negative peace, in general, is defined as a state of affairs where there is absence of armed conflict, war, or some iteration of internecine violence. Positive peace, on the other hand, is more expansive, where the very structures and cultures of violence between the societies are overcome, with a process of integration of the two societies entailing peace education, cooperation, and dispute resolution.

In the current dynamics of the region, when the United States and Armenia talk about peace, they're talking about negative peace, not positive peace, that is, *de facto* peace on the ground and absence of war or crossborder violence. Yerevan and Washington are not talking about positive peace because both understand that positive peace is a process and not an overnight phenomenon. Thus, the change in the dynamics on the use of force, where Armenia went from the constant threat of being attacked to a state of affairs where use of violence is heavily mitigated, defines both Armenia's and America's current understanding of peace. For Baku, positive peace, in and of itself, is not really an honest subject of conversation, while negative peace is a manageable concession Aliyev had to make to position himself in the domain of gains with respect to the U.S. presence in the region.

Finally, inherent in the normalization initiative is the implicit understanding that Azerbaijan will have to withdraw from the territories it has occupied within Armenia-proper as the TRIPP project comes close to conclusion and reaches the opening stage. More simply put, Azerbaijan will either have to withdraw or act as an obstructionist force against the U.S. project, for the U.S.-led normalization initiative envisions the operationalization of TRIPP with the de-occupation of Armenian territories. Thus, Azerbaijan's occupation of Armenian sovereign territory will soon become a liability for the Aliyev regime, and what Aliyev had initially deemed an important instrument of leverage against Armenia is now being deemed by the US as a source of diplomatic weakness in its relations with the U.S. In the long-term trajectory of trilateral US-Armenia-Azerbaijan relations, and in the similar trajectory of US-Azerbaijan relations, the propensity for Baku to resort to pre-Washington Accords behavior becomes

exceedingly low. This, in turn, serves as an enhancement qualifier for Armenia's nascent security architecture and the stabilizing role that vested US interests in the region play.

Russia and the South Caucasus after Ukraine: is it possible to step into the same river?

Alexander Iskandaryan

Ongoing for four years, the war in Ukraine has lasted longer than the part European theater of World War II known in Russia as the Great Patriotic War. In official Russian discourses, this war is presented as ontological, a standoff against the entire West rather than just the neighboring nation. From its very beginning, Russia's true goal in this war had not merely been the annexation of specific Ukrainian territories, but the overhauling of Europe's entire security architecture in line with Russia's perceived geopolitical interests and ontological goals. At least, this had been the plan that Russia presented to the world and, apparently, genuinely planned to achieve.

It is clear that Russia has faced the need to revisit and adjust its goals over the four years of the war's duration. And while it is, for a wide range of reasons, impossible to predict when and how this war will end, it is possible to make a general assessment of currently prevailing trends. Keeping close tabs on the Ukraine war is not just essential for countries neighboring on the conflict or directly dealing with its repercussions, but, arguably, also for all post-Soviet nations regardless of their proximity to Russia or extent to which the war has been affecting them. One reason is that, whatever the outcome of its war with Ukraine, Russia is likely to lay claim to its sphere of influence in the former USSR.

In the event that the war ends unfavorably for Russia, the Kremlin will hold on to the post-Soviet space as its last backyard, and may make an effort to stretch the shrinking shagreen skin of its empire over its former provinces. And if the outcome is favorable for Russia, one can imagine it setting up outposts of its influence in the Middle East, Africa, and some of the smaller European countries. However, even in this scenario, Russia's complete withdrawal from the post-Soviet space is unlikely. And while Moldova and Ukraine in their hypothetical future borders may eventually break free from Russia's influence, for the countries of the South Caucasus and Central Asia this isn't a probable scenario. For them, Russia will remain, at a minimum, a significant player, no matter the outcome of the war, whenever it occurs.

Prior to the events of 2020 (the Second Karabakh War), 2022 (the start of the Russia-Ukraine War), and 2023 (the deportation of the population of Nagorno-Karabakh), Russia's pattern of influence in the South Caucasus was crystal clear. For Moscow, Armenia and Azerbaijan were conjoined twins. It needed Azerbaijan to influence Armenia, and vice versa. As the region's security monopolist, Russia leveraged the two conflicting nations' need for security. Contrary to popular belief, Azerbaijan as well as Armenia purchased weapons primarily from Russia, and its security policy frameworks were also largely Russia-centered. With the tacit agreement of the United States and France, the other two co-chairs of the OSCE Minsk Group, Russia was the main player in the region, to the extent that it could effectively put an end to major outbreaks of hostility with a phone call, the way it did in 2016.

The main instrument of Russia's influence was not the conflict per se but the existence of the breakaway entity — the Nagorno-Karabakh Republic, also known as the Republic of Artsakh, — an unrecognized republic that controlled its territory. As long as this entity continued to exist, Russia was in the position to act as an arbiter and security provider for both countries. This continued even after the 2020 war, when Russian peacekeepers were deployed to Nagorno-Karabakh. However, peacekeeping implies that there is somewhere to keep the peace; in this case, the breakaway Nagorno-Karabakh Republic.

In 2021, Armenia was even planning to reform its army using Russian experience and weapons. However, after 2022, Russia was increasingly distracted by its war in Ukraine, to the point that it was clearly no longer able or willing — which in politics often amounts to the same thing — to continue proactively intervening in the Armenia-Azerbaijan conflict. This expanded Azerbaijan's window of opportunity; in 2023, it took matters into its own hands, fully deporting the population of the breakaway republic, achieving its dissolution and full extinction. This was done so brutally that, apart from a still-unknown number of local residents, several Russian peacekeepers were killed in the process, including a high-ranking officer.

With the dissolution of the Nagorno-Karabakh Republic, Russia lost its leverage over the region's security and the region in principle. It withdrew its peacekeepers, who were no longer serving a purpose. Armenia began a hurried quest for other security

partners. Azerbaijan no longer needs Russia by virtue of having won the war, and Armenia, by virtue of having lost it. The change is as drastic as it is obvious. In 2025, senior officials in both Azerbaijan and Armenia allowed themselves to make scathing comments about Russia—something that would have been unimaginable a few years previously.

Accordingly, regardless of the outcome of the war in Ukraine, there is a limit on what Russia can do in the South Caucasus now that it has lost its leverage. Russia does not have an alternative source of influence. Armenia recapturing Karabakh or Armenians going back to live there as citizens of Azerbaijan are two improbable scenarios. It's also more than unlikely that Russia will storm Azerbaijan with tanks from Dagestan or land its troops on the Caspian Sea to bring Karabakh back.

Russia's participation in various projects in both countries won't bring its influence to the level that it reached in previous years. This isn't a question of Russia's intentions (which are likely to be rekindled), but of resources. Had the Kremlin truly aimed to remain the number one external player in the South Caucasus, allowing Azerbaijan to recapture Nagorno-Karabakh had been a disaster in the light of that aim. Swapping Armenia for Azerbaijan as its security partner and ally in the region was a fundamentally impossibility; with the extinction of Nagorno-Karabakh, Russia drastically reduced its leverage over both.

This said, Russia will undoubtedly remain present and engaged in the South Caucasus. This is true in any event, e.g., even if Russia decides at some point to pursue an isolationist policy, which is something that may happen in principle. A neighboring country the size of Russia, with its territory, population, resources, and military might, will inevitably influence its neighbors, remaining a power to be reckoned with in the realm of economy, energy and communications. And while the Russian market for exports from the South Caucasus can theoretically be replaced with other markets, it will take a long time.

One cannot change the geography, nice as it would have been to have a route directly connecting Armenia and Georgia to Europe that would bypass the dangerous highland Georgian Military Road to Russia. Even full normalization of Armenia's relations with

Azerbaijan and Turkey is no alternative to North-South communication. Plus, Russia is home to the world's largest Armenian diaspora, likely to continue meddling in relations between the two countries. However, in a strategic sense, Russia's influence in the region has diminished significantly, and there are no tools in sight that can bring it back.

Armenia's Security and Democratic Trajectory in a Fractured Region - Implications for the European Union

Tigrane Yegavian

Introduction

Armenia today occupies a singular position in the European Union's eastern neighbourhood. It is simultaneously one of the region's most politically pluralistic states and one of its most strategically vulnerable. Since the 2020 Nagorno-Karabakh war and the September 2023 Azerbaijani military operation that led to the forced displacement of the Armenian population of Artsakh, Armenia has entered a phase of profound strategic uncertainty. Its traditional security guarantees have eroded, while its exposure to military coercion has increased dramatically.

At the same time, Armenia has maintained a democratic trajectory under extreme stress. Competitive elections, a vibrant civil society, and relative media pluralism have endured despite war, defeat, territorial losses and mass displacement. This coexistence of democratic resilience and acute insecurity is rare in the post-Soviet space and challenges conventional assumptions that democratisation necessarily follows stabilisation.

This article argues that Armenia has become a litmus test for the EU's geopolitical credibility, not in terms of military projection, but in its ability to align security, democracy support and regional stability in a highly asymmetric environment. The Armenian case exposes both the strengths and the limitations of the EU's current approach to crisis management, conflict mediation and normative engagement in regions where the use of force has been normalised.

Armenia's Post-2020 Security Collapse and the End of Strategic Illusions

For much of the post-Soviet period, Armenia's security strategy rested on a fragile but functional equilibrium. Membership in the Collective Security Treaty Organisation (CSTO), a bilateral alliance with Russia, and control over Nagorno-Karabakh were perceived as mutually reinforcing pillars. The events of 2020–2023 dismantled this architecture.

The 2020 war revealed Armenia's military inferiority and exposed structural weaknesses in its defence system. More significantly, Russia's inability—or unwillingness—to act as a security guarantor profoundly altered Armenia's strategic calculus. Despite the deployment of Russian peacekeepers after the ceasefire, Moscow failed to prevent repeated Azerbaijani violations, the prolonged blockade of the Lachin Corridor, and ultimately the September 2023 offensive that resulted in the displacement of more than 100,000 Armenians.

This sequence of events did not merely weaken Armenia militarily; it delegitimised the very idea of outsourced security. The CSTO's passivity during Azerbaijani incursions into Armenia's internationally recognised territory in 2021 and 2022 reinforced the perception that collective defence mechanisms were hollow. Armenia now finds itself in a position where its sovereignty is formally recognised but practically contestable.

A Region Where Force Has Become a Negotiating Tool

The broader regional context exacerbates Armenia's vulnerability. Azerbaijan has progressively integrated military coercion into its diplomatic repertoire. The use of force has been framed not as an exceptional measure but as a legitimate means of conflict resolution. This approach has been facilitated by several factors: substantial defence spending fuelled by energy revenues, strategic alignment with Turkey, and limited international repercussions.

Turkey's role has been decisive. Through military assistance, training, and political backing, Ankara has reinforced Baku's confidence that escalation carries manageable risks. At the same time, Russia's preoccupation with Ukraine and Iran's constrained regional posture have reduced external constraints on Azerbaijani action.

For Armenia, this has created a security environment defined by permanent pressure rather than episodic conflict. Border incidents, coercive diplomacy, and maximalist demands have become routine. The absence of effective enforcement mechanisms under international law has further entrenched a perception of impunity.

Democratic Resilience Amid Strategic Vulnerability

Against this backdrop, Armenia's democratic continuity is striking. The 2021 parliamentary elections, held less than a year after military defeat, resulted in a renewed mandate for the incumbent government through a competitive and largely credible process. Civil society organisations, investigative media, and opposition actors continue to operate in a relatively open political space.

Yet this resilience is not cost-free. The repeated experience of security failure has generated deep societal frustration. Public confidence in state institutions' ability to protect citizens has eroded, while polarisation has intensified between those advocating pragmatic accommodation with Azerbaijan and those favouring a more confrontational stance.

This tension highlights a structural dilemma: democratic governance in Armenia has not translated into enhanced security outcomes, at least in the short term. The risk is not an immediate authoritarian reversal, but a gradual erosion of democratic legitimacy if political pluralism is perceived as strategically ineffective.

The European Union's Expanding Role: Progress Without Protection

The EU's engagement with Armenia has expanded significantly since 2021. Brussels has positioned itself as a key diplomatic interlocutor, facilitated high-level talks between Armenian and Azerbaijani leaders, and increased financial and technical assistance. The deployment of the EU Monitoring Mission in Armenia (EUMA) in 2023 marked a qualitative shift, providing an on-the-ground presence aimed at reducing escalation risks.

EUMA has delivered tangible benefits. Its patrols have improved situational awareness along sensitive border areas and provided Armenia with a sense of political reassurance. The mission has also signalled a degree of EU commitment previously absent from the region.

However, the limits of this engagement are equally evident. EUMA is a civilian mission with no enforcement capacity. EU mediation has struggled to address core security asymmetries or to impose meaningful costs for violations of ceasefire arrangements.

Moreover, the EU's deepening energy cooperation with Azerbaijan—particularly following the 2022 gas agreement—has complicated perceptions of neutrality and normative consistency.

From Yerevan's perspective, the EU is increasingly present but not fully protective: influential yet constrained, supportive yet cautious.

Limits of the EU Monitoring Mission (EUMA): Visibility Without Deterrence

While the deployment of the EU Monitoring Mission in Armenia (EUMA) in early 2023 marked a significant political step, its operational and strategic limitations must be clearly acknowledged. Beyond its symbolic reassurance value for Armenia, EUMA has so far failed to generate tangible deterrence effects and has not substantially altered Azerbaijan's calculus on the use of coercion.

First, EUMA is neither a deterrent force nor a verification mechanism with enforcement capacity. As a civilian CSDP mission, it operates without a mandate to prevent incursions, to interpose between forces, or to provide security guarantees. Azerbaijani military pressure along the border has therefore continued largely unabated, suggesting that the mission's presence has not raised the political or strategic cost of coercive actions.

Second, and more critically, EUMA has not made its cartographic assessments or geospatial findings public. Despite repeated references to “situational awareness” and “monitoring”, the mission has not released detailed maps documenting Azerbaijani military positions or incursions into Armenia's internationally recognised territory. This absence of publicly accessible cartography severely limits the mission's political utility.

Without transparent mapping, the EU is unable to:

- substantiate claims of Azerbaijani occupation of sovereign Armenian territory,
- provide an authoritative evidentiary basis for diplomatic pressure,
- or counter narratives that frame border incidents as technical disputes rather than violations of territorial integrity.

As a result, the EU's monitoring presence remains politically under-exploited. The lack of public documentation deprives Brussels of a key leverage tool in international forums and weakens Armenia's ability to mobilise legal and diplomatic instruments based on verified facts on the ground.

Finally, this opacity reinforces perceptions of strategic caution bordering on self-deterrence. By refraining from publishing maps or assessments, the EEAS appears intent on avoiding escalation or confrontation with Azerbaijan. While understandable from a risk-management perspective, this approach undermines the EU's credibility as a normative actor committed to the principles of sovereignty and territorial integrity.

In its current form, EUMA therefore functions primarily as a confidence-building and observation mechanism, rather than as a tool of deterrence or accountability. Unless accompanied by greater transparency, political backing, and a willingness to use monitoring outputs as leverage, the mission risks being perceived as symbolic rather than strategic.

The Strategic Implications for the EU

Armenia's predicament exposes a broader challenge for EU foreign policy. The Union has developed sophisticated tools for democracy support, economic integration and civilian crisis management. It has far fewer instruments to address situations where democratic partners face sustained military coercion without triggering escalation.

The Armenian case suggests that the EU's normative power cannot be detached from security realities. Democracy promotion that fails to account for existential threats risks being perceived as abstract or insufficient. Conversely, security engagement divorced from normative commitments undermines the EU's distinctive role.

In this sense, Armenia is not an exception but a preview. Similar dilemmas are emerging across the EU's neighbourhood, where the use of force is increasingly normalised and legal frameworks are selectively applied.

Why a Strategic Agenda – and Not a Strategic Partnership Agreement

The EU's decision to adopt a Strategic Agenda with Armenia in December 2025, rather than formalising a Strategic Partnership Agreement, reflects a deliberate political compromise shaped by internal EU constraints rather than by the depth of EU–Armenia engagement itself. While the Agenda significantly elevates the relationship in political and sectoral terms, it avoids the symbolic and institutional implications associated with a fully-fledged strategic partnership label.

Several factors explain this choice. First, divergent member state positions continue to limit consensus on upgrading the EU–Armenia relationship to a formally “strategic” tier. While countries such as France, Greece, Cyprus, and the Baltic states have advocated for deeper engagement, others remain cautious or reluctant, particularly considering their bilateral energy, economic, or political relations with Azerbaijan. In this context, the Strategic Agenda represents the highest common denominator acceptable to all member states.

Second, the EU has sought to avoid signaling a hard geopolitical alignment that could be interpreted as confrontational by regional actors, notably Azerbaijan and Turkey. A Strategic Partnership Agreement—especially in a post-2023 context marked by territorial occupation and coercive diplomacy—would likely have been read as a shift in the regional balance, potentially increasing tensions in a fragile environment. The agenda allows the EU to strengthen cooperation with Armenia while preserving a degree of strategic ambiguity.

Third, the EU's preference for anchoring the relationship firmly within the CEPA legal framework has played a central role. CEPA remains the binding treaty governing EU–Armenia relations, and the Strategic Agenda is explicitly designed to operationalise and accelerate its implementation rather than supersede it. From an institutional perspective, this approach reduces legal complexity, avoids reopening ratification debates, and ensures continuity across policy cycles.

As a result, the Strategic Agenda functions as a political proxy for strategic partnership, enhancing ambition, scope and visibility—particularly in the areas of security cooperation, resilience and investment—without creating new legal

obligations or security guarantees. While this choice preserves EU unity and flexibility, it also underscores a central limitation of the current framework: the absence of a formal strategic partnership continues to cap expectations regarding deterrence, security commitments and long-term strategic alignment.

Diverging European Positions on Armenia: Drivers, Cautious Supporters and Reluctant Actors

The European Union's engagement with Armenia is often presented as a coherent institutional effort. In practice, however, it reflects a fragmented political landscape shaped by diverging national priorities, threat perceptions and bilateral interests. Understanding the EU's actual leverage in Armenia requires identifying the member states that actively drive cooperation, those that provide conditional or low-profile support, and those that remain openly or implicitly reluctant.

1. Core Supporters: Security Sensitivity and Normative Alignment

A small but influential group of EU member states has emerged as consistent advocates of deeper engagement with Armenia, motivated by a combination of historical awareness, regional security concerns and normative positioning.

France stands out as Armenia's most politically engaged European partner. Paris has played a visible role in diplomatic signalling, humanitarian assistance following the 2023 displacement crisis, and support for EU involvement in border monitoring. France's activism reflects domestic political dynamics, a strong Armenian diaspora, and a broader ambition to assert strategic autonomy in regions where EU credibility is contested.

Greece and Cyprus approach Armenia primarily through a security lens shaped by their own relations with Turkey. Both states view Azerbaijan–Turkey coordination as part of a broader pattern of assertive regional behaviour. Their support for Armenia within EU institutions has therefore been consistent, though often understated, reinforcing calls for balance and restraint in EU–Azerbaijan relations.

The Baltic states (Lithuania, Latvia, Estonia), while geographically distant, have emerged as normative allies. Their historical experience with coercive power politics

and territorial revisionism informs a principled stance on sovereignty and the use of force. For these states, Armenia is emblematic of a broader challenge facing small democracies exposed to militarised pressure.

2. Cautious Supporters: Strategic Ambivalence and Risk Avoidance

A second group of EU member states supports engagement with Armenia but does so within carefully circumscribed limits.

Germany exemplifies this position. Berlin has backed EU mediation efforts, EUMA, and reform assistance, yet remains cautious about any move that could be interpreted as strategic alignment. Germany's emphasis on stability, economic engagement and energy security—particularly in the context of reduced dependence on Russia—has reinforced a preference for balanced relations with both Yerevan and Baku.

Italy and Spain adopt a similarly pragmatic posture. While not opposed to EU engagement with Armenia, they tend to prioritise Mediterranean stability, energy diversification and commercial ties. Armenia thus remains a secondary concern, supported through EU mechanisms rather than bilateral initiatives.

This group of states does not block EU action, but rarely drives it, contributing to a structural ceiling on the Union's political ambition in the South Caucasus.

3. Reluctant or Obstructive Actors: Strategic and Transactional Considerations

A third category includes states that are either openly sceptical or selectively obstructive regarding deeper EU engagement with Armenia.

Hungary represents the most explicit case. Budapest's close political and economic ties with Azerbaijan, including energy cooperation and diplomatic alignment, have translated into reluctance to support initiatives perceived as critical of Baku. This stance has periodically complicated consensus-building within the EU, particularly on language related to accountability and the use of force.

In a different register, some southern and central European states exhibit passive reluctance, not through opposition but through disengagement. Armenia's limited economic weight and peripheral location reduce incentives for active involvement.

The Absence of a Strategic Partnership: A Structural Gap in EU–Armenia Relations

Despite increased engagement, Armenia does not benefit from a formal strategic partnership with the European Union or with any major EU member state. This absence is not merely symbolic; it has concrete political and operational consequences.

Unlike Ukraine, Moldova or Georgia, Armenia has not been offered a security-anchored integration pathway or a long-term strategic framework explicitly linking political reforms, security cooperation and economic integration. Relations remain structured primarily around the Comprehensive and Enhanced Partnership Agreement (CEPA), which, while substantial, is not designed to address existential security challenges.

The reasons for this absence are both internal and external:

- EU-level caution about provoking regional escalation or antagonising Azerbaijan and Turkey;
- Member state divisions, preventing consensus on elevating the relationship;
- Armenia’s own strategic ambiguity in the post-2020 period, balancing disengagement from Russia with uncertainty over alternative security anchors.

The result is a paradox: the EU is Armenia’s most visible diplomatic partner, yet not its strategic one.

This gap reinforces the perception that EU support, while valuable, remains contingent and reversible. It also limits the EU’s ability to shape long-term defence reform, deterrence posture and regional security arrangements.

Strategic Implications for EU Credibility

The combination of fragmented member state positions and the absence of a strategic partnership constrains the EU’s ability to act as a decisive actor in Armenia. More importantly, it sends a broader signal: that democratic alignment does not necessarily translate into strategic commitment.

For Armenia, this creates uncertainty. For other EU partners facing coercion, it raises questions about the Union’s willingness to move beyond declaratory support.

Conclusion

Armenia stands at the intersection of three systemic crises: the erosion of post-Cold War security architectures, the weakening of international law, and the vulnerability of small democracies in coercive regional environments. Its trajectory will be shaped not only by domestic choices, but by the willingness of external actors to engage beyond declaratory support.

For the European Union, Armenia represents a test case of whether a non-military power can still exert strategic influence in a fragmented world. The outcome will shape perceptions of the EU's role far beyond the South Caucasus.

Key Policy Recommendations

- **Embed security considerations into democracy support**
EU assistance programmes should explicitly address democratic resilience under external pressure, including crisis governance, protection of institutions, and counter-disinformation capacities.
- **Strengthen long-term security sector reform (SSR)**
Expand EU support for defence governance, civilian oversight, and border management without framing these efforts as military alignment.
- **Enhance the political weight of EUMA**
Maintain and expand the mission's mandate, visibility and reporting capacity to reinforce deterrence through transparency and sustained presence.
- **Reduce normative ambiguity in EU mediation**
Avoid false equivalence in conflict narratives and clearly articulate EU positions on territorial integrity and the use of force.
- **Align energy policy with geopolitical messaging**
Ensure that strategic partnerships do not undermine the EU's credibility as a normative actor in conflict settings.
- **Adopt a long-term engagement framework**
Move beyond crisis response towards a predictable, multi-year strategy focused on resilience, sovereignty and democratic sustainability.
- **Acknowledge political reality**
Explicitly recognise the absence of a strategic partnership and clarify the conditions under which such a framework could emerge.

- **Build coalitions of willing member states**
Formalise coordination among France, Greece, Cyprus and the Baltic states to drive EU initiatives and offset internal reluctance.
- **Differentiate engagement without fragmentation**
Allow deeper bilateral and minilateral cooperation within an EU framework, without requiring unanimous ambition.
- **Upgrade CEPA implementation with a security dimension**
Expand CEPA's scope to include structured dialogue on defence governance, resilience and crisis response.
- **Increase political signalling**
Use high-level visits, joint statements and long-term commitments to reduce perceptions of strategic ambiguity.

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Armenia's Security and Democratic Trajectory in a Fractured Region - The Role of Iran

Anna Georgian

Regional Power Shifts: Why Iran still matters for Armenia

Since 2022, Armenia's foreign and security architecture has undergone significant reshaping due to shifts in regional power balances. Russia's weakening position amid the war in Ukraine (Sukiasyan, N., & Davtyan, E. (2025)), Turkey's expanding regional role (Cornell, S. E. (2024).), Iran's simultaneous assertiveness and vulnerability (Golmohammadi, V., & Azizi, H. (2025)), and [renewed U.S. engagement](#) have together transformed the geopolitical landscape of the South Caucasus.

In response, Armenia has pursued an adaptive, [balanced multi-vector foreign policy](#). This approach aims to consolidate sovereignty by diversifying partnerships while avoiding confrontation with major powers. Although Armenia's diplomatic discourse increasingly emphasizes integration with [Western institutions](#), Iran's deterrence posture in the South Caucasus remains a critical element of Armenia's security calculus. Understanding how Armenia balances its Western reorientation with sustained engagement with Iran is essential to interpreting its evolving foreign and security policy after 2023 and calculating possible risks in that field in the coming years.

Iran's approach to the South Caucasus after the second Nagorno-Karabakh war reflects several core national security priorities. [These include](#) safeguarding territorial integrity, preventing border changes, limiting extra-regional military involvement, and balancing Turkey's regional influence. In this context, stable relations with Christian Armenia also serve Tehran's broader effort to project a stigma-free and inclusive regional image.

At the same time, Iran seeks to reinforce its regional role through multilateral formats such as the 3+3 framework and engagement with the Eurasian Economic Union, while maintaining strong cultural and historical ties. [These overlapping interests](#) explained

Iran's firm rejection of the "Zangezur corridor" and its opposition to Turkish expansionism—positions that directly aligned with Armenia's security concerns.

Iran's reaction to the event in White House was twofold: on the one hand, before the signing of the declaration, an article [by Ali Akbar Velayati was published](#) on the same day, in which he expressed himself in rather harsh vocabulary about the "third party involvement" in the region. The main concern was the same one Iran had expressed for years in its opposition to the so-called 'Zangezur Corridor': changing of the borders between Armenia and Iran, and involvement of third-party security forces. Meanwhile, Minister [Araghchi](#) has made several statements that Iran is assured its [red lines are taken into account](#) in the declaration, that there is no mention of the presence of a third party and especially the armed presence, and that the Armenian side has assured that the signed declaration can in no way hurt the common Iran-Armenia border. And though Mr. Velayati [repeated his concerns recently](#), there was no Iranian reaction towards the [joint statement](#) of foreign ministers of Armenia and USA, Mirzoyan and Rubio and the Publication of the Armenia-U.S. Implementation Framework for the Trump Route for International Peace and Prosperity (TRIPP).

However, Iran's capacity to sustain this regional posture has become increasingly constrained by internal instability and external pressure. Iran's current regional policy is situated at a crossroads marked by [economic crisis](#), political fragmentation, uncertain leadership dynamics, and escalating tensions within the Iran–Israel–U.S. triangle.

Iran currently faces simultaneous [internal crises \(economic and political\)](#) and [external pressure](#), primarily stemming from confrontation with Israel and the United States. Its next strategic steps—whether renewed escalation or cautious diplomatic engagement—will heavily influence regional stability.

Although the 12-day war and targeted strikes against [Iranian nuclear facilities have delayed Iran's nuclear ambitions](#), they have not eliminated them. At the same time, Iran's "Axis of Resistance" has weakened across Syria, Lebanon, and Yemen, reducing Tehran's regional leverage (Schwartz, K. (2024).). Even before the protests erupted in December 2025, it was already obvious that even if structural regime change will not happen in the near future, internal [recalibration is inevitable](#), with possible growing

emphasis on diplomatic and presidential institutions and signs of ideological adjustment within the ruling elite.

Possible future scenarios still include:

- **Escalation:** renewed conflict with Israel or deeper U.S. involvement.
- **Diplomatic engagement:** cautious negotiations aimed at easing isolation and economic pressure.
- **Strategic ambiguity:** balancing confrontation and negotiation to maintain internal control while preserving regional influence. Recent protests of the country and the harsh and brutal reaction of the authorities further complicated the future of the latter two scenarios.

Protests in Iran

Analytical interpretations of protests in Iran typically fall into two dominant narratives:

- demonstrations reflect demands for social, economic, and individual freedoms but do not challenge the Islamic Republic itself;
- such demands serve as a pretext for deeper dissatisfaction with the political system.

Both interpretations contain elements of truth. [Protest movements in modern Iran](#) are mostly homogeneous; throughout almost all previous protests, participants included those focused on socioeconomic grievances, those advocating for civil liberties, and those who view systemic political change as necessary. Meanwhile, external actors and diaspora communities tend to emphasize regime critique, while internal dynamics at least until recently, remain more fragmented.

The current wave of demonstrations was triggered by the [sharp fall of the rial](#), but this shock occurred within a broader context of economic crisis, post-war exhaustion, declining regional influence, and waves of [other protests brutally suppressed](#) during previous years. These pressures are compounded by years of heavy investment in external allies at the expense of domestic infrastructure, which has [worsened shortages](#), unemployment, and poverty. Since 2022, [state repression following the Mahsa Amini protests](#) has further intensified public grievances.

Even if not all demonstrators reject the political system itself, the above-mentioned conditions are structurally linked to Iran's regional policies, delayed engagement with the U.S. over the nuclear file, governance failures, and the impact of international sanctions. President Pezeshkian's government has attempted to initiate dialogue during the first days of the protests, but the further brutal and mass killings of the protestors as well as declaring [members of ISIS were among them](#), have narrowed the possibility of future internal dialogue.

According to Iranian historian Yervand Abrahamian, throughout Iranian history, the protests become politically critical when the “bazaar” joins them (Abrahamian, E. (1982). Recent protests started with the [closure of “Bazaars”](#), therefore signaling an escalation that should not be underestimated. At the same time, renewed U.S. pressure for direct nuclear negotiations—coupled with implicit threats of military escalation—adds further volatility to the situation.

The coming phase may bring if not systemic collapse at least a transformation of Iran's political identity—from a predominantly Islamic framework toward a more nationalistic discourse. Whether this reflects a genuine ideological transition or a tactical adaptation remains uncertain. Overall, uncertainty in Iran's trajectory remains rooted in both external confrontation dynamics and internal instability related to leadership succession and strategic orientation.

Implications for Armenia

Iran's internal instability and external confrontation pose significant risks for Armenia's security environment. Iran has been an important—though not exclusive—actor in containing regional threats affecting Armenia, and weakening this factor may reduce Armenia's strategic resilience.

Instability in Iran could disrupt Armenia's economic and logistical interests, undermine connectivity projects, and increase the risk of refugee inflows and humanitarian pressure. Following Israeli and U.S. strikes against Iran in June 2025 and the imposition of new sanctions, the likelihood of socio-economic unrest in Iran has increased, making it increasingly difficult for Iranian authorities to maintain internal control. The most recent protests make this task even more unrealistic.

At the same time, the risk of renewed military escalation remains, given not only direct threats coming from Washington, but also because neither Israel nor the United States has achieved its strategic objectives regarding Iran's nuclear program, ballistic missile capabilities, or regional posture after 12-days war against Iran. Public statements by U.S. leadership expressing support for demonstrators are further broadening the possible scenarios of interference.

Thus several trajectories remain possible:

- **Internal recalibration:** power shifts toward civilian institutions, enabling renewed Iran–U.S. dialogue and partial economic relief.
- **Externally driven regime change:** military intervention followed by transitional governance, with uncertain implications for territorial integrity and regional stability.
- **Fragmentation risk:** while currently unlikely, prolonged instability could fuel federalization pressures or territorial fragmentation, particularly in peripheral regions.

For Armenia, all scenarios underscore the importance of maintaining strategic flexibility, safeguarding connectivity routes, and reinforcing diplomatic engagement with all major actors involved in Iran's trajectory. Given the current situation, when Iran would possibly be further isolated and its authorities more cautious and [sometimes undiplomatic in their demands](#), this task will be the main risk Armenia will have to deal with in the coming months and years.

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Armenia's Security and Azerbaijan

Stephan H. Astourian

There are times when what one could call the “pace of History” accelerates. More significant changes occur within five or six years than in the previous decades. The 1930s, especially their second half, was such a period, witnessing among others the Spanish Civil War and the Nationalists’ victory, the second Italo-Abyssinian War, the German *Anschluss*, the rise of an ultra-nationalist, military-led autocracy in Japan and the latter’s aggression against Nationalist China resulting in the so-called “rape of Nanking,” the League of Nations’ irrelevance, and Nazi Germany’s annexation of the Sudetenland followed by the rest of Czechoslovakia and its war of aggression against Poland, among other things. Unlike the 1930s, however, the current transformations are multifaceted and multidimensional: climate change and its consequences, drone warfare, with its related technologies (inaugurated in the 2020 Karabagh conflict), AI’s fast-paced progress, U.S.-Chinese tensions, the war in Ukraine, the Israeli attack against Iran, with US support, the Trump tariffs, and the new US National Security doctrine, which seems to distance it from its longtime allies within NATO, the Europeans, etc.. In this context, what is happening in the South Caucasus is rather an epiphenomenon, contrary to the opinion of many experts in Armenia. The ‘South Caucasus’ is not even mentioned in the National Security Strategy of the U.S. (November 2025) and Armenia and Azerbaijan are merely referred to in the context of the eight “raging conflicts” that the U.S. has settled “over the course of just eight months” (*National Security Strategy of the United States of America*, November 2025, p. 12). One should thus perceive what has been going on in the South Caucasus over the past months, in particular the numerous so-called “strategic” agreements signed by both Armenia and Azerbaijan with some modesty and restraint, even though these agreements are not insignificant, as the adjective “strategic” seems to be facing both inflation and devaluation. They include *inter alia* the “Charter on Strategic Partnership Between the United States of America and the Republic of Armenia (January 14, 2025); the “Memorandum of Understanding between the Government of the United States of America and the Government of the Republic of Azerbaijan regarding the establishment of a Strategic Working Group to develop a Charter on Strategic Partnership between

the United States of America and the Republic of Azerbaijan” (August 8, 2025); the “Strategic Agenda for the EU-Armenia Partnership” (December 2, 2025); or the Joint Declaration on a Strategic Agenda for the Bilateral Partnership between the Federal Republic of Germany and the Republic of Armenia” (December 9, 2025).

To assess in this context where Azerbaijan might be headed to in its relations with Armenia over the next few years, prudence is required. For Niccolo Machiavelli, prudence was a ruler’s supreme quality; prudence is also mentioned a few times in François de Callières’s early eighteenth-century treatise on diplomacy, still a reference today (Nicolo Machiavelli, *The Prince*, chapters XV-XIX, XXI, XX, at <https://www.gutenberg.org/files/1232/1232-h/1232-h.htm>, accessed on December 2, 2025; François de Callières, *The Practice of Diplomacy* being an English rendering of François de Callières « *De la manière de négocier avec les souverains*, » pp. n14, n90, n162, at <https://archive.org/details/practicediploma00whytgoog/page/n44/mode/2up>, accessed on December 2, 2025). It is then in the spirit of prudence that I will first list what we don’t know about some things, not all things, that may shape Azerbaijani behavior in the near future. Beyond prudence, an attempt at understanding Azerbaijan’s positions and intentions—whether fully proven or very likely—requires setting them against the backdrop of the more obvious US and European interests in the region. In a recent book, Director of the French Institute of International Relations (IFRI) Thomas Gomart argues that the current technological, climatic, and geopolitical “accelerations” intersect and amplify one another. Their effects tend to concentrate around specific geographic areas, which he calls “geostrategic nodes”: the Indo-Pacific, especially the South China Sea; the Arctic; the Black Sea region; and various maritime straits, such as Hormuz, Bab-el-Mandeb, and Malacca (Thomas Gomart, *L'accélération de l'histoire : Les nœuds géostratégiques d'un monde hors de contrôle* [The Acceleration of History: The Geostrategic Nodes of a World Out of Control], Paris: Tallandier, 2025). Naturally geoeconomic considerations are also part of this acceleration of history, one characteristic of which is the struggle for the control of trade routes. It thus happens that Syunik or Zangezur is the critical chokepoint of the so-called Middle Corridor trade route linking China and Central Asia with Europe, via the South Caucasus. It is against this broad geopolitical and geoeconomic backdrop that one must set the quite sudden U.S. interest in the South Caucasus at the highest

level of its Administration, the resulting project called the Trump Route for International Peace and Prosperity [TRIPP], which Azerbaijanis and Turks still call the “Zangezur Corridor,” and the ongoing peace process between Armenia and Azerbaijan. For the West, Azerbaijan is the key link between Central Asia and Europe, via Georgia or Türkiye, or both; and its policies are synchronized with Türkiye, the NATO pillar in the region and a major European Union trade partner and, possibly, military partner in its future defense architecture. Armenia, on the other hand, is a defeated, weak country, whose leaders are ready to concede much to secure peace and some international partnerships, thus improving incidentally their chances of staying in power after the legislative elections of June 2026. Both Azerbaijan and Türkiye are aware of these facts, which suggests that they will up the ante when it comes to the so-called “Zangezur Corridor” [the 43-44 km passage between mainland Azerbaijan and its exclave, Nakhichevan], the opening of borders with Armenia, and the conclusion of peace. Finally, assessing Azerbaijan’s intentions requires looking at its actions and statements in their coordination with its Turkish ally.

As the acceleration of history and the concomitant rise of multiple points of tension and conflict increase uncertainty and contingency, Azerbaijan has no significant incentive to be in a rush to sign the peace treaty with Armenia; likewise, Türkiye has no reason to be in a hurry to open its border with Armenia. For instance, we do not know if, how, and on what terms the Russia-Ukraine war will end in the coming year or years. Could it end, perhaps temporarily, with an arrangement between the U.S. and Russia? How could Russia, until then busy in Ukraine, reassert its influence in the South Caucasus? We do not know either whether a new Israel-Iran, US-Iran, or Israel-US-Iran conflict might erupt, with unpredictable effects on the South Caucasus. Leaving aside other international tensions, it is also still unclear who will build the Trump Route for International Peace and Prosperity (TRIPP). Moreover, even after the recent “Joint Statement on the Publication of the Armenia-U.S. Implementation Framework for the Trump Route for International Peace and Prosperity (TRIPP)” on January 14, 2026, some of its modus operandi, to be discussed later, are unclear (“Joint Statement on the Publication of the Armenia-U.S. Implementation Framework for the Trump Route for International Peace and Prosperity (TRIPP),” January 14, 2026, at <https://www.mfa.am/en/press-releases/2026/01/14/TRIPP/13721>, accessed January 20, 2026). So are the

positions and demands of Azerbaijan and Türkiye regarding this “Implementation Framework.” In view of Azerbaijan’s and Türkiye’s insistent use of the term “Zangezur Corridor,” these remarks by a longtime observer of the South Caucasus are worth considering:

As for the TRIPP, differences might arise from customs procedures for cargo crossing Armenia. Also, how would the US control the corridor on the ground, and what will happen if danger to the route arises? And last but not least, will the US maintain its commitment for the 99-year term? [NB: the latest TRIPP “Implementation Framework” mentions a forty-nine-year term, extendable subsequently by fifty years]. (Emil Avdaliani, “Trump’s Road TRIPP Delivers a Deal,” August 13, 2025, at <https://cepa.org/article/trumps-road-tripp-delivers-a-peace-deal/>, accessed on December 13, 2025).

Two former U.S. ambassadors to Azerbaijan provide a plausible, indirect answer to one of these questions: “Importantly, Turkey can now serve as a buffer and deterrent against any unhelpful interference in the region” (Robert F. Cekuta and Richard L. Morningstar, “Trump’s Armenia-Azerbaijan agreement advanced peace, but Washington can’t let up now,” August 13, 2025, at <https://www.atlanticcouncil.org/blogs/new-atlanticist/trumps-armenia-azerbaijan-agreement-advanced-peace-but-washington-cant-let-up-now/>, accessed on December 13, 2025). Regarding customs, one might ask how they could be reconciled with the trade and customs regulations of the Eurasian Economic Union, of which Armenia is a member. One could mention that TRIPP focuses mainly on the link between Azerbaijan and its exclave, Nakhichevan. Do Azerbaijan and Türkiye intend to fully integrate Armenia, say, by re-opening the Kars-Gyumri railway, or by allowing a railway link from the Western side of Nakhichevan back into Armenia via Yeraskh and on to Gyumri and Kars? That would connect Armenia with the Baku-Tbilisi-Kars railway forming the Middle Corridor’s principal rail artery. Finally, much depends on Türkiye opening its border with Armenia, which itself seems contingent on the signing of the peace treaty. TRIPP, without open borders, especially with Türkiye, will be only beneficial to the latter and Azerbaijan, as well as to the US and the West more broadly. It will be of little use to Armenia.

Against this backdrop, what about Azerbaijan specifically? All the parameters determining the power balance in relation to Armenia are in its favor: the size of the economy, military power, population data, etc. Azerbaijan's importance to the U.S., Europe, Russia, Central Asian States, Türkiye, Iran, and Georgia is incommensurably higher than that of Armenia. The "Shusha Declaration on Allied Relations between the Republic of Azerbaijan and the Republic of Turkey" provides Azerbaijan with what amounts to security guarantees on the part of NATO-member Türkiye (President of the Republic of Azerbaijan, İlham Aliyev, "Shusha Declaration on Allied Relations between the Republic of Azerbaijan and the Republic of Turkey," June 16, 2021 at <https://president.az/en/articles/view/52122>, accessed on December 12, 2025). Armenia has de facto none. One final point: it has been said that Azerbaijan's economic prospects are not good, that President Aliyev knows that the country's future is not bright, etc., because of the decline of its oil production. The decline is true and so is its concomitant loss of revenue for the State in relation to its peak level of 2022. In this regard, the Azerbaijani State is already taking some unpopular measures (Mahmud Rzaev, "Running out of time—Azerbaijan looks to tax hikes to counter shrinking hydrocarbon reserves," January 21, 2026, at <https://oc-media.org/running-out-of-time-azerbaijan-looks-to-tax-hikes-to-counter-shrinking-hydrocarbon-reserves/>, accessed January 24, 2026). Those revenues, however, will still outmatch the average tax payments to the State for the 2010-2021 period. This is what the Baku Research Institute (BRI) states:

Between 2010 and 2021, tax payments from the oil sector remained around 2–2,2 billion manats. In 2022, they rose sharply to 7,4 billion manats due to payments from Shah Deniz. Documents submitted to parliament indicate that tax payments from the oil and gas sector as a whole will continue to decline in 2025–2026 and stabilize at around 3,6 billion manats.^[1] This is 2,1 times less than the peak level recorded in 2022. During this period, tax payments related to crude oil are expected to decrease by nearly 1 billion manats (BRI Team, "Crude Oil Production Declines Rapidly in Azerbaijan," November 17, 2025, at <https://bakuresearchinstitute.org/en/crude-oil-production-declines-rapidly-in-azerbaijan/>, accessed on December 13, 2025).

On the other hand, gas production is at the very least going to increase, and most probably to do so very significantly with the recent British Petroleum (BP) final investment decision (FID) for the development of the Shah Deniz Compression project (SDC). This is the third stage of development of the giant Shah Deniz gas field (BP, “Go-ahead for next phase of development of giant Shah Deniz gas field,” June 3, 2025, at https://www.bp.com/en_az/azerbaijan/home/news/press-releases/Go-ahead-for-next-phase-of-development-of-giant-Shah-Deniz-gas-field.html, accessed on December 13, 2025) and the crucial factor for growth after 2027. While hydrocarbon revenues are very much likely to decrease over the next five years unless gas prices are extremely high, the State Oil Fund of the Republic of Azerbaijan, with its US\$ 63 billion as of Quarter 1 2025 will be able to cushion the challenging transition of the State budget, assuming such a transition might successfully take place (SWF [Sovereign Wealth Fund], “Fund of the Month: State Oil Fund of Azerbaijan, SOFAZ,” May 1, 2025, at <https://globalswf.com/news/fund-of-the-month-state-oil-fund-of-azerbaijan-sofaz->, accessed on December 13, 2025). To sum up, President Aliyev and Azerbaijan face a significant problem in the medium to long run, but they are not at the end of their rope, say, in the coming three years.

The massive imbalance between Armenia and Azerbaijan once noted, the “Agreement on Establishment of Peace and Inter-State Relations between the Republic of Armenia and the Republic of Azerbaijan” is a good starting-point to assess where things stand and are going with Azerbaijan (Ministry of Foreign Affairs of the Republic of Armenia, “Publication of the Initialed Agreement between Armenia and Azerbaijan,” August 11, 2025, at <https://www.mfa.am/en/press-releases/2025/08/11/Initialed%20Arm-Az%20Peace%20Agreement%20text/13394>, accessed on December 7, 2025). As Mr. Hikmet Hajiyev, Assistant to the President of the Republic of Azerbaijan, recently stated at the Doha Forum, in the presence of Mr. Armen Grigoryan, Secretary of the Security Council of the Republic of Armenia, “Azerbaijan...presented the real text of the peace agreement on the table” (Doha Forum, “Armenia Azerbaijan Lasting Peace: The Washington Accord and a Shared Future” December 6, 2025, at <https://www.youtube.com/watch?v=taHHLSpRGvgf>, accessed on December 19, 2025). Made up of seventeen articles, the Agreement, initialed in Washington, DC, on August 8, 2025, is quite interesting because an average educated reader may be at a loss as to

who the vanquished party might be. With the exception of Article VII, enjoining “the Parties shall not deploy along their mutual border forces of any third party,” a reference to the European Union Mission in Armenia which observes and reports on the security situation on the Armenian side of the Armenian-Azerbaijani border, and to some extent Article XV, stating that “the Parties shall withdraw, dismiss, or otherwise settle any and all interstate claims, complaints, ...[that] existed between the Parties before the signing of this Agreement in any legal forum within one month from the date of entry into force of this Agreement,” a reference mainly to the Armenian lawsuits filed in international courts, but also to the Azerbaijani ones, whose chance of success seem to be much lower, the other articles appear commonsensical and very general. They mostly lay down principles, such as the recognition of “the boundaries between the Soviet Socialist Republics of the former USSR” (Art. I) and the exclusion of “territorial claims to each other,” including in the future (Art. II), or they stipulate that the “Parties shall refrain from intervening with the internal affairs of each other” (Art. IV). One then wonders why Azerbaijan has not signed this agreed upon peace treaty. The reason is quite simple: the articles of this peace treaty do not include all the commitments expected from Armenia and/or agreed upon by the latter. Crucial Azerbaijani demands were not, for whatever reason, included in it. As Reuters reported three days after the initialing of the Agreement, “Baku said ‘further actions’ were required to sign the peace agreement, including amendments to Armenia's constitution that would ‘eliminate territorial claims against Azerbaijan’” (Lucy Papchristou and Nailia Bagirova, “Azerbaijan, Armenia publish text of US-brokered peace deal,” Reuters, August 11, 2025, at <https://www.reuters.com/world/azerbaijan-armenia-publish-text-us-brokered-peace-deal-2025-08-11/>, accessed on December 2, 2025).

To assess Azerbaijan’s intentions, one should ask whether its actions or policies since the initialing of the “Agreement on Establishment of Peace and Inter-State Relations between the Republic of Armenia and the Republic of Azerbaijan” indicate that it intends to comply with its terms? Azerbaijan has in fact already breached de facto many of the clauses of this Agreement, which are useful fictions, while at least another clause raises concerns. The preamble of that Agreement refers to the Almaty [then Alma-Ata] Declaration of 21 December 1991, whereby eleven newly independent republics of the former Soviet Union were “recognizing and respecting each other's

territorial integrity and the inviolability of existing borders” (The Executive Committee of the Commonwealth of Independent States, “Alma-Ata Declaration (December 21, 1991),” at <https://eccis.org/en/page/178>, accessed on January 18, 2026). In a recent rebuke to an important article published by The Netherlands Institute of International Relations Clingendael (Marina Ohanjanyan, “Armenia and Azerbaijan: peace or pause? September 2025, at https://www.clingendael.org/sites/default/files/2025-09/PB_Armenia_and_Azerbaijan_Peace_or_Pause.pdf, accessed on January 8, 2026) mentioning “the current Azerbaijani occupation of territory inside Armenia’s borders,” an expert of the quasi-official Azerbaijani Center of Analysis of International Relations had this to say:

The assertion of “a current Azerbaijani occupation of territory inside Armenia’s borders” is incorrect. There is no internationally recognized Armenian territory under Azerbaijani occupation. After the Soviet Union collapsed, Armenia and Azerbaijan inherited an un-delimited Soviet administrative line. Because that line was never precisely fixed on the ground, some sections of the frontier have been subject to differing cartographic interpretations. Both sides have therefore created state commissions on delimitation and demarcation and agreed to settle every outstanding stretch lawfully and peacefully. (Mirza Ibrahimov, “AIR Center’s Response Clarifying Misinterpretations in Clingendael’s policy brief “Armenia and Azerbaijan: Peace or Pause?” December 2025, at <https://aircenter.az/en/single/the-air-center-has-issued-a-clarification-document-in-response-to-clingendael-s-policy-brief-1966>, accessed on January 8, 2026).

In a nutshell, Azerbaijan does not appear to recognize the occupation of 240-250 km² of Armenian territory, but it remains to be seen whether it will try to carry out the process of elimination on such a basis. To be sure, some of those areas might require more precise delimitation; however, such territorial adjustments would not come close to encompassing 240 km² or more. In contradiction to the Declaration of Alma-Ata referenced in the initialed peace treaty, it is moreover far from certain that Azerbaijan considers the Soviet administrative borders between and among titular republics as State borders. In this context, Article I of the “Agreement on Establishment of Peace

and Inter-State Relations” stipulating that “the borders of the Soviet Socialist Republics of the former USSR became the international borders of respective independent states” could be negated, and that Article’s reference to “territorial integrity” and “inviolability of international borders” might become somewhat dubious in due time, which in turn would make the Article VI mention of “good faith negotiations between the respective border commissions” regarding delimitation and demarcation questionable. Ironically enough, while assuming, or pretending to assume that Azerbaijan recognizes the Alma-Ata declaration about state borders, Prime Minister Pashinyan asserted more than once that the issue of the 240 km² would be addressed during the process of delimitation and demarcation (see Armenpress, “Prime Minister Pashinyan Responds to Aliyev’s Statements,” January 8, 2025, at <https://armenpress.am/en/article/1208938>, accessed on January 2, 2026 and “Prime Minister Nikol Pashinyan addresses the nation,” August 18, 2025, at https://www.primeminister.am/en/statements-and-messages/item/2025/08/18/Nikol-Pashinyan-Speech/?utm_source=chatgpt.com, accessed on January 2, 2026). As only 12.7 km of the Armenia-Azerbaijan border have been delimited and demarcated since May 2024, the Prime Minister might be considering this issue as secondary at this point or be punting on it.

Azerbaijan has also been breaching Article II, which states that “the Parties confirm that they do not have any territorial claims to each other and shall not raise any such claims in the future.” Its claims about “Western Azerbaijan,” or the return of “Western Azerbaijanis” to their “homeland,” implies that a substantial part of Armenia is Western Azerbaijan (Joshua Kucera, “Azerbaijan seeks ‘Great Return’ of refugees to Armenia,” January 17, 2023, at <https://eurasianet.org/azerbaijan-seeks-great-return-of-refugees-to-armenia>, accessed January 4, 2026). Whereas months before the Washington meeting and TRIPP, the return of the Azerbaijanis was a threatening demand, it has morphed afterwards into a “humanitarian” claim: the “Western Azerbaijanis” would simply return by car. In a speech at a conference celebrating the eightieth anniversary of Azerbaijan’s National Academy of Sciences on November 3, 2025, President Aliyev shared his views about Azerbaijanis living beyond “our borders”:

They also lived in Armenia, but were driven out of there. But I am sure that they will live there again.... And today, Azerbaijanis do not create and will not create problems for any state or its people. Therefore, the return of Azerbaijanis to the present-day Armenia should not intimidate the people or the state of Armenia. I said this some time ago as well. We must return to our historical lands – not in tanks, but in automobiles (“Conference marking 80th anniversary of Azerbaijan National Academy of Sciences held,” November 3, 2025, at <https://president.az/en/articles/view/70464> (accessed January 4, 2026).

Contrary to what one could expect, the “Western Azerbaijani campaign seems to have intensified since the initialing of the peace treaty. It is actually directly funded and organized by Azerbaijan’s Presidential Administration (Rasmus Canbäck, “EXCLUSIVE: Azerbaijan’s ‘Western Azerbaijan’ campaign exposed in leaked documents,” November 3, 2025, at <https://oc-media.org/exclusive-azerbajians-western-azerbaijan-campaign-exposed-in-leaked-documents/>, accessed on January 4, 2026; HetqTV, “Փաստորեն. Ալիեւի աշխատակազմից արտահոսած պայմանագրերը,” January 16, 2026, at <https://www.youtube.com/watch?v=sYcTGmrf7p8>, accessed on January 20, 2026). For a long time, Armenian ruling party deputies and experts close to the government asserted there was nothing to worry about: the “Western Azerbaijan” campaign was meant for the internal consumption of the Azerbaijani populace. The recent “Annual Report” of Armenia’s Foreign Intelligence Service, however, views this campaign resulting from a state policy with concern and seeks to assess “whether by using these narratives as a new national ideology Azerbaijan intends to transport the conflict into the territory of Armenia in some new form or to use it as a tool for foreign policy bargaining, and, more precisely as a way to offset the issue of the return of Karabakh Armenians”(Foreign Intelligence Service, “Annual Report: On External Security Risks of the Republic of Armenia, 2026,” p.8, at <https://armenpress.am/en/article/1240013>, accessed on January 21, 2026).

Article IV states that “[t]he Parties shall refrain from intervening with the internal affairs of each other.” This is rational. However, Azerbaijan has been demanding that the Armenian Constitution be modified because Article I refers to the Armenian Declaration

of Independence, which in turn mentions that the declaration is “[b]ased on the December 1, 1989, joint decision of the Armenian SSR Supreme Council and the Artsakh National Council on the “Reunification of the Armenian SSR and the Mountainous Region of Karabakh” (“Armenian Declaration of Independence,” August 23, 1990, at <http://www.parliament.am/legislation.php?sel=show&ID=2602&lang=eng>, accessed on January 4, 2026). Armenia is complying with this demand, a *condicio sine qua non* for the signing of the peace treaty, while denying that it is doing so under Azerbaijani pressure. On the other hand, Article II of the “Constitutional Act on State Independence of the Republic of Azerbaijan,” adopted on October 18, 1991, asserts that “the Republic of Azerbaijan is the successor of the Republic of Azerbaijan, which existed from May 28, 1918, to April 28, 1920” (“Azərbaycan Respublikasının dövlət müstəqilliyi haqqında KONSTITUSİYA AKTI,” October 18, 1991, at <https://e-qanun.az/framework/6693>, accessed on January 5, 2026). While the First Republic of Azerbaijan had no recognised borders, it defined and presented its “proper borders” at the Paris Peace Conference in 1919. Here are the demands related to Armenians-inhabited regions, including in the then First Armenian Republic, as summed up by a Baku State University historian:

...it was vital to establish the proper borders of Azerbaijan for the conference leaders. The territory of Azerbaijan was drawn up according to the former system of executive division:

2. Yelizavetpol (Ganja) Province, including Yelizavetpol (Ganja), Javanshir, Nukha (Sheki), Arash, Shusha, Jabrayil, Zengezur and Qazakh districts.

3. Irevan Province, including Nakhchivan, Sharur-Dereleyez, Surmeli districts, as well as a part of New Beyazid, Echmiadzin, Irevan and Alexandropol districts (Vasif Gafarov, “The Azerbaijani Delegation to the Paris Peace Conference,” *Visions of Azerbaijan*, July–August 2012, at <http://www.visions.az/en/news/404/6a7cabf7/>, accessed on May 1, 2024).

President Aliyev’s demands about “Western Zangazur,” that is Syunik, and “Western Azerbaijan” are rooted in the above-mentioned claims (for “Western Zangazur,” see Joshua Kucera, “What’s the future of Azerbaijan’s “ancestral lands” in Armenia?” July

16, 2021, at <https://eurasianet.org/whats-the-future-of-azerbajians-ancestral-lands-in-armenia>, accessed on December 8, 2025). Finally, President Aliyev's recognition of the Alma-Ata Declaration and the resulting State borders would in a way contradict Article II of the "Constitutional Act on State Independence of the Republic of Azerbaijan," adopted on October 18, 1991.

Article VIII of the peace treaty, in turn, enjoins that the "Parties condemn and shall combat intolerance, racial hatred and discrimination, separatism, violent extremism and terrorism in all their manifestations within their respective jurisdictions." The State-sponsored "Armenophobia" permeating Azerbaijani society, from elementary school textbooks to public discourse, does not comply with this Article. The reference to "separatism," on the other hand, is an invitation to restrain any demand by the ethnically cleansed Karabagh Armenians.

Finally, from the perspective of a prudent approach, Article IX includes a detail which can be instrumentalized at a convenient time. This Article pertains to "the cases of missing persons and enforced disappearances" that occurred in the armed conflict between the two countries. Part of the Article states that the "Parties, hereby acknowledge the importance of investigating the fate of those persons... and ensuring that justice is served in relation to these persons through proper investigations." Not unlike the old Karabagh Armenian who was accused of having committed genocide and was released by Azerbaijan very recently, Azerbaijan could accuse any Armenian or group of Armenians at an opportune moment of having been involved in such "enforced disappearances." As a matter of fact, an international conference addressing the issue of missing persons took place in Baku on October 9, 2025 ("International conference opens as part of Baku Dialogue on Missing Persons," October 9, 2025, at <https://azertag.az/en/xeber/international-conference-opens-as-part-of-baku-dialogue-on-missing-persons-3793659>, accessed on January 14, 2026). In his address to the participants, read out by Colonel-General Ali Naghiyev, President Aliyev stated the following:

One of the humanitarian tragedies resulting from Armenia's aggression against Azerbaijan, which lasted for over 30 years, is the disappearance of approximately 4,000 Azerbaijanis, including children, women, and the

elderly. Following the liberation of our territories, 29 mass graves were discovered in these areas. Forensic examinations of the remains found there confirm that the victims were subjected to horrific torture – a deeply distressing reality. The mass killing of people under torture, their inhumane burial, and attempts to conceal the traces of these crimes constitute a grave violation of international legal norms (Ilham Aliyev, President of the Republic of Azerbaijan, “To the participants of the international conference on “Uniting efforts and enhancing cooperation for addressing the issue of missing persons,” October 9, 2025, at <https://azertag.az/en/xeber/3793935>, accessed on January 14, 2026).

To sum up, the above-mentioned Articles reflect Azerbaijan’s real disposition before the “Joint Declaration by the President of the Republic of Azerbaijan and the Prime Minister of the Republic of Armenia on the outcomes of their meeting in Washington D.C., United States of America” was co-signed by President Trump. The latter satisfied Azerbaijan to a significant extent as it ensured “unimpeded connectivity between the main part of the Republic of Azerbaijan and its Nakhichevan Autonomous Republic through the territory of the Republic of Armenia with reciprocal benefits for international and inter-state connectivity for the Republic of Armenia.” “Benefits” are in the eye of the beholder; spelled out rights, such as “unimpeded connectivity,” are clearer. In addition, the above formulation undermines the principle of “reciprocity,” mentioned in Prime Minister Pashinyan’s speech on “The Crossroads of Peace” at the Tbilisi International Forum was dropped by Armenia. This is how it reads: “Principle #4 All countries use all the infrastructures on the basis of reciprocity and equality. According to the principle of reciprocity and equality, border and customs control procedures can be somewhat streamlined, too” (“Prime Minister Pashinyan presents the “Crossroads of Peace” project and its principles at the Tbilisi International Forum,” October 26, 2023, at <https://www.primeminister.am/en/statements-and-messages/item/2023/10/26/Nikol-Pashinyan-Speech/>, accessed on January 4, 2026; also https://www.primeminister.am/u_files/file/documents/The%20Crossroad%20of%20Peace-Brochure.pdf, p.2, accessed on January 4, 2026).

After the peace treaty was initialed and the TRIPP document signed, the statements and rhetoric of the top Azerbaijani officials, such as President Ilham Aliyev, Assistant to the President of the Republic of Azerbaijan and Head of Foreign Policy Affairs Department of the Presidential Administration Hikmet Hajiyev, and Minister of Foreign Affairs Jeyun Bayramov, became overall positive but also somewhat ambiguous, asserting that peace had been established, but Armenia had to make some more efforts for its signing, constitutional change and the implementation of the “Zangezur Corridor” as envisioned by Azerbaijan being often mentioned. Even before the Washington meeting with President Trump and the two South Caucasian leaders, Mr. Hikmet Hajiyev stated at the GLOBSEC-2025 international forum in Prague that “[p]eace between Armenia and Azerbaijan has, in essence, been achieved.” He added that “[t]he current atmosphere in the region is positive, and Azerbaijan is ready to use this peace to advance all areas of cooperation” (Murad Abiyev, “Riding the Wave of Efficiency,” June 17, 2025, at <https://caliber.az/en/post/riding-the-wave-of-efficiency>, accessed on January 7, 2026). In his year-end briefing to journalists, on the other hand, Foreign Minister Bayramov is reported as having stated “that “[a]mending Armenia's constitution and fully implementing obligations under the TRIPP project are essential for signing the initialed peace agreement” (Sayad Hasanly “MFA: Azerbaijan has repeatedly proven validity of its position on need for changes to Armenian constitution,” December 26, 2025, at <https://report.az/en/amp/foreign-politics/bayramov-armenia-must-amend-constitution-to-sign-peace-deal>, accessed on January 6, 2026).

The implementation of the TRIPP project became clearer when Armenia’s Foreign Minister Ararat Mirzoyan and U.S. Secretary of State Marco Rubio met on January 14, 2026, and issued the “Joint Statement on the Publication of Armenia-U.S. Implementation Framework for the Trump Route for International Peace and Prosperity (TRIPP)” (“Joint Statement on the Publication of the Armenia-U.S. Implementation Framework for the Trump Route for International Peace and Prosperity (TRIPP),” January 14, 2026, at <https://www.mfa.am/en/press-releases/2026/01/14/TRIPP/13721>, accessed on January 20, 2026). Perhaps the most important characteristic of TRIPP’s implementation is the “Front Office-Back Office” operating model, with the former being operated by “private operators contracted by the TRIPP Development Company”

who will “provide customer-facing services” and the latter by “Armenian customs and border officials” exercising “all sovereign authority.” Two issues require some comments. First, President Alyev had demanded that Azerbaijanis should not come into contact with any Armenians while crossing Armenia on their way to Nakhichevan. Second, this “Joint Statement” keeps stressing Armenia’s sovereignty an unusual number of times. The document raises too many questions that space restriction for this essay does not permit me to address. For instance, will Armenia’s deficient State capacity be able to deliver promptly all the commitments required from that country in this document? Will the back office really be able to override a decision of the front office in case of a disagreement? Regarding such questions, two sections of the “Joint Statement” might provide a tentative glimpse into possible answers. The first mentions that “[d]ecisions that touch on certain sensitive issues covered by specified reserve matters are expected to be resolved jointly through an Armenia-U.S. Steering Committee.” What are those “sensitive issues” and “reserve matters”? Are they related to Azerbaijani demands? The second asserts that “[p]rivate operational security personnel may be employed subject to Armenian licensing.” As a matter of fact, Radio Free Europe/Liberty had reported before the tripartite meeting in Washington that “Pashinian (sic) spoke of ongoing ‘intensive discussions’ on the creation of a company that would run the corridor and invest in it. He said it would have ‘many functions,’ including ensuring the security of the transit routes.” He actually compared this arrangement with the operation of Zvartnots Airport in Yerevan and didn’t “think that Armenia’s sovereignty, jurisdiction, and territorial integrity” were violated in any way (Shoghik Galstian, “Pashinian Open To Third-Party Control of Corridor For Azerbaijan,” July 16, 2025, at <https://www.azatutyun.am/a/33475976.html>, accessed January 4, 2026). Yet, the “Armenia-U.S. Implementation Framework” clearly states that the back office would oversee “security screening and enforcement,” “law enforcement actions,” and “inspection and examination.” More generally, Armenia would have “control over nationals security and law enforcement,” as well as “authority over vborder control and customs for trade and transit through the TRIPP.”

As for Türkiye’s reaction to this “Joint Statement,” Foreign Minister’s Hakan Fidan’s press conference the day following the publication of the document revealed that he spoke for “perhaps two hours” over the phone with his Azerbaijani counterpart.

Referring to TRIPP as the “Zangezur Corridor,” he stated that “there are some technical issues related to that.” And later he added, “Now, our goal, in short, involves a lot of technical topics” (İçtimai TV, “Hakan Fidan: “Türkiyə Zəngəzur dəhlizinin Azərbaycanın istədiyi kimi reallaşmasını arzulayır,” January 15, 2026, at https://www.youtube.com/watch?v=7K2GbJX2N_o, accessed on January 25, 2026). The devil of the “Zangezur Corridor” seems to be in the technical details. About two months earlier, the foreign minister is reported to have told the lawmakers of the Turkish Parliament’s Planning and Budget Committee “that Armenia and Azerbaijan had initiated a draft agreement in Washington but [he] stated that two key issues remained unresolved: the Zangezur Corridor and certain provisions in Armenia’s constitution” Once these issues addressed and the peace treaty with Azerbaijan signed, “Türkiye would also move to open its border with Armenia” (Newsroom, “Türkiye links normalization with Armenia to Azerbaijan peace deal, says FM Fidan,” November 19, 2025, at <https://www.turkiyetoday.com/nation/turkiye-ties-normalization-with-armenia-to-azerbaijan-peace-deal-says-fm-fidan-3210079?s=1>, accessed on January 5, 2026). Neither Azerbaijan nor Türkiye have yet approved the “Implementation Framework.” Evidence suggests they will negotiate its technical details.

Conclusion

Where do all the above leave us?

There are unknowns, which make prediction difficult.

- A. What if a U.S. or U.S.-Israeli attack on Iran leads also to Iranian military retortion against Azerbaijan?
- B. What if Prime Minister Pashinyan’s party fails to win in the June 2026 parliamentary elections?
- C. What if the referendum on the new Armenian Constitution leads to its rejection?
- D. What if TRIPP is finalized legally before such a rejection and peace is not concluded?

- E. What is the full spectrum of actions Russia is envisioning to prevent Prime Minister Pashinyan's reelection? Could it extend beyond the current overall moderate "hybrid warfare," a theme Armenia's government affiliated deputies and pro-government experts have hammered at on TV channels and in interviews over the past six months, or so? After all, even though Russia appears weakened currently because of the Ukraine war and of Western sanctions, it is unlikely it intends to let its main pillar in the South Caucasus, Armenia, slip from its grasp amiably.
- F. What if peace is concluded and TRIPP finalized, but passage of Armenian freight across Azerbaijan turns out, in due time, not to be unproblematic?
- G. What if everything goes fine and TRIPP is implemented, but Türkiye's border opens to freight transportation and later closes? Does Armenia have any recourse?
- H. How will Armenia reconcile TRIPP with its membership in the Eurasian Economic Union?
- I. What about Prime Minister Pashinyan's "Crossroads of Peace" vision? Nowhere is this project clearly discussed, at least publicly. One of the memoranda signed in Washington, DC, on August 8, 2025, does mention the "Crossroads of Peace" in its title. Its content, however, is about "capacity building." On the other hand, some recent developments suggest that Armenia is striving to make the "Crossroads" vision come true, perhaps as a result of some understandings with Azerbaijan and Türkiye, but things are far from finalized (Daily Sabah, "Türkiye, Armenia hold 2nd round of talks on reopening Kars–Gyumri railway," November 25, 2025, at <https://www.dailysabah.com/politics/diplomacy/turkiye-armenia-hold-2nd-round-of-talks-on-reopening-karsgyumri-railway>, accessed on January 12, 2026; Armenpress, "Pashinyan asks Russia to urgently restore parts of railway," December 18, 2025, at <https://armenpress.am/en/article/1237885>, accessed on January 14, 2026; Arshaluys Barseghyan, "Pashinyan and Putin meet in Russia, discuss restoration of Armenia's railways," December 23, 2025, at <https://oc-media.org/pashinyan-and-putin-meet-in-russia-discuss-restoration-of-armenias-railways/>, accessed on January 14, 2026). Yet, the fact that Türkiye has started constructing the Kars-Iğdır-Aralık-Dilucu railway line linking Azerbaijan through its Nakhichevan

exclave via TRIPP to Kars, while circumventing Armenia, raises questions. This 224-kilometer-long railway line, once operational, “is expected to carry 5.5 million passengers and 15 million tons of freight annually.” For the realization of this project, Türkiye’s Treasury and Finance Ministry has already secured €2.4 billion (\$2.8 billion) in external financing (Newsroom, “Türkiye to lay foundation for \$2.8B key railway section of Zangezur Corridor,” August 21, 2025, at <https://www.turkiyetoday.com/business/turkiye-to-lay-foundation-for-28b-key-railway-section-of-zangezur-corridor-3205705?s=1>, accessed on February 6, 2026).

Leaving all these issues aside, and there are also others, how can one assess the chances of TRIPP’s implementation and therefore peace?

TRIPP, as its envisioned implementation framework suggests, comes very close to the Azerbaijani and Turkish understanding of the “Zangezur Corridor.” The main, and crucial difference, among a few less important things, is that *de jure* Armenian sovereignty over the Syunik passage will be preserved; perhaps less so Armenian control over the transiting freight. This corridor, which Azerbaijan and Türkiye viewed as vital to their vision of the “Turkic World,” will be essentially under US control, unless shareholders of the TRIPP Development Company change over time. The reference in the document to yet unknown “ultimate beneficial owners” confirms such a possibility. It is of interest to note that Carl Kress, the regional director for Eurasia of the US Trade and Development Agency, is reported to have discussed at the Azerbaijani Foreign Ministry “ways to connect Azerbaijani government agencies with US private-sector representatives to explore corporate investment in the development of TRIPP infrastructure” (Eurasianet, “Azerbaijan and U.S. Weigh Cooperation on Peace Corridor and Energy Projects,” January 14, 2026, at <https://oilprice.com/Geopolitics/Asia/Azerbaijan-and-US-Weigh-Cooperation-on-Peace-Corridor-and-Energy-Projects.html>, accessed January 27, 2026). This piece of news might need further official corroboration; however, it cannot be disregarded at this point. Finally, any Azerbaijani-Turkish demands about the technical details of TRIPP’s implementation are likely to reinforce the US role as they will aim at further reducing any leverage Armenia has left on this project.

TRIPP is even more important for Azerbaijan and Türkiye than it is for Armenia. Azerbaijan will be the unavoidable transit country from China and Central Asia to the West. As hydrocarbon revenues, mainly crude oil, are declining, Azerbaijan is striving to focus on the diversification of its economy and on connectivity. TRIPP is useful for both. As Shahmar Hajiyev, Head of Department at the Center of Analysis of International Relations, put it,

This new direction seeks to shift the country from energy-centric growth to a development model built on connectivity, renewable energy, and enhanced regional integration. By positioning itself as a transport and energy hub, Azerbaijan is advancing major regional initiatives such as the Southern Gas Corridor, the Caspian–European Union Green Energy Corridor, Middle Corridor, and TRIPP Corridor. Collectively, these projects are enhancing the country’s geopolitical importance while opening new economic opportunities (Guest Contributor, “Azerbaijan’s path to economic diversification and connectivity leadership,” December 6, 2025, at <https://www.eureporter.co/azerbaijan/2025/12/06/azerbaijans-path-to-economic-diversification-and-connectivity-leadership/>, accessed on January 14, 2026).

At a time when Georgia is drifting towards Russia and facing significant tensions with the U.S. and the E.U, TRIPP will provide Azerbaijan with a second transport route, independent from Russia. One may also ask whether Azerbaijan can afford to create significant problems with the implementation of TRIPP in the context of its current relations with the US. This is how President Aliyev summed up the latter in a recent interview with Azerbaijani TV channels:

The relations between Azerbaijan and America are developing in a very practical and result-oriented direction. Since October, I have dispatched four delegations to America – consisting of ministers, representatives of the private sector, and other senior officials. It is possible to say that the preparation of a strategic charter in the main directions and the organization of mutual investments, the coverage of the economic, trade, transport, and military-industrial directions of our relations are on the agenda. In other words, we have high hopes, and the results are fairly impressive. Therefore, from this

point of view, 2025 can certainly be considered as a very successful and historic year. (“Ilham Aliyev was interviewed by local TV channels,” January 5, 2026, at https://president.az/en/articles/view/71213?utm_source=chatgpt.com, accessed on January 18, 2026)

Türkiye’s gains will be even more significant as it will become Eurasia’s main trade hub for almost all the ongoing transport projects (see, for instance, Anna Ohanyan, “Can Turkey Cut the Gordian Knot in the Caucasus? November 10, 2025, at <https://carnegieendowment.org/research/2025/11/can-turkey-cut-the-gordian-knot-in-the-caucasus?lang=en>, accessed on December 27, 2025). Besides, assuming that in the coming years a Chinese consortium succeeds in building the deep-sea port of Anaklia in Western Georgia, which would divert massive freight from Türkiye and reduce its role as a hub significantly, TRIPP would counterbalance such a development (on Anaklia, see Dr. Anna Dolidze, “Anaklya Port and Great Powers: Competition over the New Eurasian Gem,” July 15, 2025, Rabdan Security and Defence Institute publication, at <https://rsdi.ae/en/publications/anaklya-port-and-great-powers-competition-over-the-new-urasian-gem>, accessed on February 6, 2026; and RFE/RL’s Georgian Service and Reid Standish, “Chinese-Led Consortium To Build Massive Port Project on Georgia’s Black Sea Coast,” May 29, 2024, at <https://www.rferl.org/a/anaklia-georgia-china-port-winner/32970697.html>, accessed February 6, 2026).

On the other hand, when it comes to decision-making, it is not always the case in autocratic regimes that national interest takes precedence over their leaders' idiosyncrasies and interests.

1. The Azerbaijani and Turkish maximalist conditions regarding the conclusion of peace and the “Zangezur Corridor” are meant to extract even more concessions from a weak Armenia. This is combined with some goodwill gestures, such as Kazakh grain transit through Azerbaijan to Armenia, fuel supplies, etc., to suggest that peace is around the corner. However, Azerbaijan demands that Armenia take “further actions,” as mentioned earlier. These maximalist conditions are also a bargaining tool with the West. For instance, President Aliyev is now demanding that the U.S. Congress remove Section 907 of the 1992 United States Freedom Support Act.

2. The somewhat schizoid position adopted by Azerbaijan keeps its options open until all TRIPP-related details are finalized, and it increases what it views as its leverage.

3. Much will depend on the degree of influence, or pressure, Washington is willing to exert on Azerbaijan and Türkiye, assuming it had not consulted with the latter before even the TRIPP project was “launched,” or its implementation architecture outlined.

4. In this context, a bare-bones abductive inference about TRIPP’s finalization and the conclusion of peace would be that they are “quite likely,” **unless** one or more of the main unknowns mentioned above take place. The transition from “formal” peace to real peace, however, would require much time and also reforms, such as putting an end to the State-sponsored “Western Azerbaijan” project and to Armenophobia, among others. Such reforms look unlikely in the near future. At a minimum, though, the recent agreements discussed in this essay have brought a modicum of stability to the South Caucasus and have led to the first steps of Armenian-Azerbaijani normalization.

A final word: prudence necessitates considering what one writer called “the black swan,” that is, a highly improbable event or development, the consequences of which can be massive (Nassim Nicholas Taleb, *The Black Swan: The Impact of the Highly Improbable*, 2nd ed., New York, Random House Publishing Group, 2010). Disregarding or being unaware of such “black swans” results from a cognitive bias known as “failure of imagination” and leads to high impact low probability (HILP) events. This essay was meant to face the reality of recent developments and agreements, hidden behind the fog of manipulation and disinformation. It was also meant to consider what can or may go wrong in the future. However, what can and may go wrong does not always go wrong.

From Isolation to Leverage: Armenia's Strategy Toward Turkey

Garó Paylan

Armenia is navigating one of the most consequential periods since independence. At a time of global disorder—marked by war, shifting alliances, and intensifying great-power competition—the country faces the dual challenge of safeguarding its security while preserving its democracy.

Within this context, relations with Turkey occupy a critical place in Armenia's strategic calculus. As Yerevan has correctly assessed, normalization with Turkey is not a tactical gesture; it is a strategic necessity for reducing Armenia's isolation, expanding economic horizons, and strengthening its diplomatic resilience in a volatile environment. A meaningful normalization process can contribute to Armenia's security by creating stability, improving connectivity and increasing Armenia's economic options —key ingredients for its security and resilience over the coming years.

A Difficult History

The history between Armenia and Turkey is undoubtedly painful, and unresolved. The legacy of genocide denial, a century of cold peace, and limited people-to-people contact have produced deep societal mistrust that continues to limit policy choices.

But the two countries share an existentially critical land border —the longest-standing closed borders between neighboring states not formally at war.

Any prospect of diplomatic normalization since Armenia's independence was further impaired by Turkey's long-standing alignment with Azerbaijan under the doctrine of "one nation, two states." By linking Armenia–Turkey relations directly to the Armenia–Azerbaijan conflict, Ankara's position entrenched Armenia's isolation and constrained its own ability to pursue an autonomous policy toward Yerevan.

Against this backdrop, the Zurich Protocols of October 2009 represented the most serious attempt at normalization. The protocols were drafted under a more liberal global climate and sought to establish diplomatic relations without formal preconditions, illustrating that normalization was briefly conceived as decoupled from

the Armenia–Azerbaijan conflict. Their failure—never ratified by Ankara and formally annulled by Armenia in 2018—demonstrated how Azerbaijani pressure constrained Ankara’s willingness to proceed.

Another rupture came with the second Nagorno-Karabakh war in 2020. Turkey’s overt political and military support for Azerbaijan deepened Armenian fears that Ankara was willing to become a direct party to the conflict, hardening public attitudes about normalization. At the same time, the post-war environment exposed the limits of Armenia’s heavy dependence on Russia for security and economic access. As this dependence proved insufficient to prevent strategic loss, Armenia began reassessing its position and seeking greater strategic autonomy.

It was in this context that Armenia–Turkey normalization was reactivated through the appointment of special envoys in late 2021 as a pragmatic response to a changed balance of power and the rising costs of continued non-engagement.

Why Turkey Matters

For much of the post-Soviet period, Armenia’s security calculus rested on an ultimately costly assumption: Turkey and Azerbaijan were seen primarily as threats, while Russia served as the indispensable security provider and economic anchor. This framework shaped Armenia’s defense for decades, but over time it also generated deep structural vulnerabilities.

The 2020 Nagorno-Karabakh war exposed the limits of this model at an exceptionally high cost. The lesson was stark: dependence on one dominant power—however close the relationship—does not guarantee security and can, in fact, amplify vulnerability. With the war in Ukraine, Russia’s disregard for the rules-based order and desire to control what it viewed as its own sphere of influence also pose a serious challenge to Armenia.

Against this backdrop, Armenia’s need to reduce its isolation and adopt a more flexible set of alliances became obvious. In this context, Turkey emerges as an essential partner – one that could contribute to regional stability and provide options for Armenia in a multipolar world. Normalization with Turkey is not about a historic reconciliation

but about reducing Armenia's isolation and expanding its economic, logistical, and diplomatic space, giving Armenia greater resilience and agency at an uncertain global climate. It is also about increasing stakeholders in a regional security order that would reduce chances of future military threats from Azerbaijan or Russia.

The Geo-Economics of Turkey–Armenia Normalization

Beyond security, normalization with Turkey carries substantial geo-economic potential. Armenia and Turkey's eastern regions share similar challenges—underdevelopment, limited investment, and outward migration—but also significant untapped potential in trade, tourism, logistics, agriculture, and manufacturing. Opening the border would allow these areas to function as interconnected economic spaces, rather than landlocked and isolated peripheries.

Border opening could have a rapid and visible impact on tourism. With complementary cultural heritage, historical sites, natural landscapes, and strong diaspora interest, Armenia and Turkey's eastern provinces could have significant cross-border tourism. This could generate employment, stimulate small and medium-sized enterprises and create incentives for infrastructure investment on both sides of the border. It would also be the beginning of people-to-people contacts.

Normalization would also transform Armenia's access to global markets. Direct overland routes to Turkey would give Armenian products efficient access to European markets and Black Sea and Mediterranean ports, sharply reducing transport times and costs. While some fear that Armenian industry would be threatened by Turkey, in reality there is more complementarity than risks. Free market access would strengthen Armenia's export competitiveness, open up a large Turkish market for its goods and diversify supply chains. Increased trade volumes would benefit producers and consumers alike, while encouraging joint ventures and cross-border value chains. The region would become more appealing for international investment.

More broadly, normalization with Turkey would reposition Armenia within regional connectivity and energy discussions. Armenia sits at the crossroads linking the South Caucasus, the Black Sea, and the Eastern Mediterranean – and open borders could make it a hub. Meanwhile for Turkey, Armenia's inclusion would open trade and energy

routes beyond Caucasus and create new opportunities for investments. This shift — from isolation to interconnection—is central to building a stronger regional order that would help Armenia survive in an increasingly fragmented and uncertain global trade system.

Turkey–Armenia and Azerbaijan–Armenia peace and normalization processes would attract significant regional and international investment, fostering economic interdependence across the South Caucasus. Over time, this interdependence could become one of the most effective deterrents against renewed escalation in the region.

Ankara's Regional Calculus: Armenia as a Bargaining Chip

Since the 2020 war, Ankara has increasingly viewed Armenia not solely as a bilateral issue but as part of a broader strategy of regional growth and geopolitical hedging. Normalization has thus functioned less as a process to be completed than as leverage—used selectively in Turkey’s dealings with Azerbaijan and the United States. This instrumental approach helps explain the persistent gap between diplomatic dialogue and concrete implementation of steps needed for normalization.

President Erdogan has limited incentive to move forward on normalization for its own sake, absent a clear strategic return. Turkey’s alignment with Azerbaijan under the “one nation, two states” doctrine means that Armenia is often folded into Ankara’s broader management of relations with Baku, including on energy, security cooperation, and regional influence. At the same time, Armenia also functions as a card in Turkey’s relationship with Washington. Periodic signals of flexibility toward normalization have coincided with moments when Ankara sought goodwill, de-escalation, or concessions from the United States on unrelated fronts.

From this perspective, stalling is not inertia but strategy. Erdogan is seeking to recalibrate relations with Washington and appears to view progress on Turkey–Armenia normalization—particularly opening the land border—as a bargaining chip.

This logic is particularly relevant considering Turkey’s expectations about its honeymoon with the Trump administration. President Trump has repeatedly expressed interest in working closely with Turkey across multiple domains — particularly in regional

peacemaking, stabilization and post-conflict reconstruction in places like Gaza, Ukraine and Syria. Erdoğan, in turn, appears to anticipate that Washington will ultimately ask him to move forward on Armenia – offering joint deals and specifically asking for normalization. Until such a request is made, and until it is tied to issues Ankara prioritizes, normalization is likely to remain deliberately incomplete.

Turkey's Domestic Politics: No Strategic Reset

At this point in time, no major political party in Turkey opposes normalization with Armenia – and that is good news. While parties have different ideas on foreign policy, most believe Turkey can improve relations with Armenia while keeping its special relationship with Azerbaijan. Turkey's domestic political calendar adds uncertainty but not transformation. Presidential elections are scheduled for 2028, yet constitutional term limits mean that President Erdoğan could only seek another term through early elections, likely in the fall of 2027. Nevertheless, across Turkey's political spectrum there is broad continuity on core regional positions, particularly on the need to have full normalization with Armenia only after there is a treaty between Armenia and Azerbaijan.

Conclusion: Using the Peace Window Strategically

Normalization with Turkey is not a panacea, but it is a strategic necessity in a fractured region. If managed carefully, it can reduce isolation, strengthen Armenia's economy, and expand diplomatic options at a time when traditional security guarantees are less reliable.

In this context, the full normalization of relations with Turkey holds transformative potential. If realized, it can shift Armenia from isolation to regional integration, anchor a durable westward orientation, and help ensure that Armenia enters the next phase of regional competition not as a passive object of power politics, but as an actor with agency and options.

Notwithstanding Positive Changes, Four Existential Challenges Imperil Future of Armenia

Hrair Balian

Armenia has expanded its international relations by diversifying its partners beyond traditional reliance on Russia, with a particular focus on strengthening ties with the United States, European Union, France, and India. This has involved strategic partnerships, increased security and military cooperation, broader economic and political engagement, and regional connectivity projects. Moreover, Armenia's economy has grown significantly in recent years, a rare success story often overlooked, fueled by a surge in incomes, capital inflows, consumption, and the influx of high-tech specialists and investments.

However, four existential challenges imperil the future of Armenia as a sovereign democratic state and its economic progress: (1) persistent gaps in national security; (2) rise of authoritarian governance, democratic backsliding, and political polarization; (3) demographic decline; and (4) peaceful coexistence amidst regional and global rivalries.

Expanding International Relations and National Security Gaps

Armenia is strengthening ties with the U.S., EU, France, India and China for strategic partnerships, focusing on security procurement, economic development, and connectivity projects (CEPA, 2025). However, Armenia risks facing retaliation from Russia, as it diversifies its foreign policy away from Moscow. This could include trade restrictions, loss of remittances, or disruptions to energy supplies (SpecialEurasia, 2025), due to decades of deep economic, energy, and security dependence on Moscow, a legacy of the Soviet era that has survived. This reliance provides Russia with significant leverage through hybrid tactics, including information warfare, to influence Armenian domestic politics (Korkiya, 2025).

Over the past decade, Armenia has learned the hard lesson that security guarantees from Russia are worthless. Yet, Armenia's security diversification leaves open the question of adequate defense capacity in case Azerbaijan returns to renewed aggression. While Armenia has made notable strides in modernizing its military since

the 2020 war, the consensus among experts is that these improvements are an important “step in the right direction” but require sustained commitment, increased funding, and more coherent implementation to achieve sufficient deterrence capabilities (Nersisyan, 2025).

National security readiness requires a more comprehensive approach. Significant gaps remain in Armenia’s defense planning and doctrine across command methodology inherited from the Soviet era, intelligence capacity, and civil preparedness (Dulgarian, 2025). Meantime, “neither the United States nor its allies are willing to offer Armenia security guarantees, let alone a formal military alliance, given the risks that might entail if Armenia has to call on such assurances” (Rand, 2024). In other words, Armenia’s security gaps remain the elephant in the room.

Economic Growth

Armenia’s economy has been marked by “resilience and steady growth for over two decades” (Akopyan, David, 2024), including a 2025 GDP forecast of 5.2% growth due to strong consumer spending and services, with unemployment dropping to 12.3%, and an expanding technology sector. This growth rate is projected to moderate to around 4.7% by 2027. To build on this, the government is focusing on improving competition, investing in renewable energy, boosting agriculture, and enhancing digital infrastructure (World Bank, 2025). Small and medium enterprises in Armenia have expanded from 60,000 in 2017 to 90,000 by the end of 2021. This has led to decline in unemployment from 19% in 2018, down to 11.7% in 2023 (Akopyan, David, 2024).

Armenia’s GDP per capita is comparable to that of its neighbors. In 2025, data showed Armenia’s GDP per capita at \$8,970, while Georgia was at \$10,130 and Azerbaijan was at \$7,370. However, Armenia has a smaller per capita GDP than its larger neighbor, Turkey at \$18,200 (IMF, 2025).

Significant factors contributing to Armenia’s economic growth include: a highly educated labor talent; the government’s anti-corruption efforts “dismantling entry barriers and boosting investor confidence”; strong inflows of professionals and capital from Russia and Ukraine following the Ukraine war; and a “sophisticated and affluent” Armenian diaspora transferring knowledge and facilitating access to world markets

(Akopyan, David, 2024). Armenia also benefits from significant mining resources (gold, copper, molybdenum, zinc), and a strategic position at the crossroads of South Caucasus (Coface, 2024).

However, there are economic, political, and development challenges, including infrastructure deficiencies, high energy costs, export diversification, improving education to enhance human capital, poverty, governance institutions in need of reform (Dhaka Opinion, 2025). Moreover, the economy is heavily reliant on Russia for trade, remittances, and foreign direct investment, making it vulnerable to sanctions and regional instability (Coface, 2024).

Authoritarian Governance, Democratic Backsliding, and Political Polarization

Historically, Armenia has struggled with building robust state institutions. While the post-2018 government has initiated reforms, these institutions remain fragile and continue to be affected by political polarization and governance challenges (Civilnet, 2023). Prime Minister Nikol Pashinyan's 2018 populist "velvet revolution" promised anti-corruption reforms which initially strengthened the rule of law. However, progress has been stunted by political polarization and executive power consolidation (Zolian, 2025).

International bodies like Human Rights House Foundation have documented credible reports of torture and ill-treatment of detainees by law enforcement, including beatings to extract confessions, questions about the effectiveness and impartiality of judicial reforms, excessive force during protests, lack of accountability for violators, and restrictions on freedom of expression and media (Human Rights House, 2021). In the past year, Armenian authorities have arrested high-ranking bishops amid escalating tensions between the government and the Armenian Apostolic Church. The crackdown has extended beyond the clergy to include other government critics and opposition figures, including municipal officials and prominent businessmen. The arrests are widely viewed as politically motivated attempts to silence dissent against Prime Minister Pashinyan's administration during the leadup to the 2026 elections (Caravel, 2025).

The Armenian government's interference in church affairs is leading to a severe church-state crisis, and a deterioration of religious freedom. The government's actions are a sign of increasing authoritarianism and have escalated from verbal abuse to the Prime Minister's demands that the head of the Church be removed and replaced by a state-appointed body, directly violating Article 17 of the Armenian Constitution, which guarantees the separation of church and state. The clash between the state and the church is deepening political polarization within the country, further eroding public trust (Azatutyun, 2025). In essence, the interference is transforming a historic national institution into a central battleground for Armenia's current political and human rights crisis (Vartanyan, 2025).

Freedom House has raised concerns about executive overreach, lack of transparency in ruling party finances, and judicial independence. Political polarization between the ruling "Civil Contract" party and opposition forces has hindered constructive dialogue. The judiciary remains problematic (Freedom House, 2024). Judicial independence requires that the Supreme Judicial Council operate free from executive interference, with appeals processes for disciplinary decisions as recommended by the Venice Commission. Advancing decentralization would reduce provincial and municipal reliance on central government, fostering local democracy (Viti, 2023).

Armenia's 2015 constitution introduced a parliamentary system that critics argue concentrated power within the ruling party. The system provides "an opportunity for a single party to control both the executive and judiciary through a one-party legislature" (BTI, 2024). The current system grants extra seats to the leading party if it fails to secure 54% majority, ensuring single-party government. Removing this provision would necessitate coalition building, power-sharing, and give smaller parties more leverage. Constitutional term limits for prime ministers would prevent indefinite entrenchment of single leaders. Empowering opposition with more resources and procedural rights would enhance legislative checks on government. Addressing the polarized media environment and ensuring fair access to public media would help balance narratives (Manougian, 2022). The opposition must develop a unified, constructive approach combining street activism with electoral engagement, building credible alternatives around common goals rather than solely criticizing the ruling party (Oskanian, 2024).

However, more fundamental changes may be necessary. Some argue that a constitutional return to presidential or semi-presidential systems would be unlikely to remedy the democratic deficit and could worsen it. Building strong, independent institutions and mature political culture is important. But more structured reflection is necessary, including possibly rethinking the constitutional system adopted in 2015.

Bridging Armenia's divide with the diaspora requires improved communication and shared vision focused on national priorities. Remedies could include: formal mechanisms such as Diaspora Advisory Councils; systems allowing greater diaspora participation through income tax systems whereby diasporans vote on allocating funds to specific projects, linking financial contributions to democratic engagement (Akopyan, Gregory, 2023); encouraging dialogue initiatives to bridge gaps on sensitive issues such as normalization with neighboring countries; addressing hate speech and misinformation that exacerbates polarization (Waldroff, 2021); encouraging return of skilled professionals through programs like Repat Armenia and iGorts; coordinated diaspora investments reinforcing policy priorities (Chenorhokian, 2023); and symbolic, short-term military service to strengthen Armenia-diaspora relationships (Piroyan, 2022).

Armenia's Demographic Decline

Armenia faces significant demographic decline from low birth rates and high emigration, exacerbated by conflict and economic instability. The government is implementing a new demographic strategy focused on human capital and improving family conditions (Seferian, 2023). Missing are measures providing affordable housing and regional development outside Yerevan.

Birth rates declined by 6.3% in the first eight months of 2025 compared to 2024. Contributing factors include the low number of people born in the 1990s entering reproductive years and socio-economic pressures. Outward migration, particularly among youth, contributes to population aging. Child mortality rose notably in 2025, including a 7.3% increase in infant deaths. Wars and ongoing security concerns have worsened the situation through economic hardship and displacement (Markosyan, 2022).

Possible remedies could include incentivizing larger families through financial and social support, including cash bonuses for more than two children; promoting repatriation of Armenian citizens living abroad; attracting Armenian migrants from countries under security stresses; improving economic conditions by creating employment and improving housing affordability; enhancing security to create stable, attractive living conditions; and focusing on human capital development ensuring that everyone can contribute to and benefit from economic growth (UNFPA, 2024).

Peaceful Coexistence Amidst Regional and Global Rivalries

Armenia's relations with immediate neighbors remain problematic. Since independence, Armenia has been at war with Azerbaijan and has sustained enmity with Türkiye, both imposing border blockades. Relations with Georgia are ambiguous due to its role hosting Azerbaijan-Türkiye pipelines. Although Armenia enjoys friendly relations with Iran, it must navigate these cautiously given Western reservations.

On 8 August 2025, Armenia and Azerbaijan signed eight documents in Washington, marking a potential turning point. The centerpiece is a Joint Declaration for peace signed by Prime Minister Pashinyan and President Aliyev with President Trump as witness (US DoS, 2025). Armenia's and Azerbaijan's foreign ministers initialed, pending further Armenian unilateral concessions before full signature, a 17-article Agreement on Establishment of Peace and Inter-State Relations (Peace Agreement) (Armenia MFA, 2025). The two countries had bilaterally agreed on the terms of the document in March 2025 but had not formalized signatures. Following the summit, Türkiye announced it will open its border with Armenia once the Peace Agreement is signed (Turkish Minute, 2025).

The two ministers also signed a memorandum dismissing the OSCE Minsk Group, which will take effect on 1 December 2025 (OSCE CiO, 2025). Additionally, President Trump waived Section 907 of the Freedom Support Act, which had banned U.S. military assistance to Azerbaijan (US Federal Register, 2025). Moreover, the summit produced four bilateral memoranda with the U.S., with Armenia signing three focusing on border security (Armenia PM, 2025), energy security (Reopen, 2025), and AI/semiconductor innovation (Reopen, 2025). Azerbaijan's memorandum established a

working group to develop a Charter on Strategic Partnership (Caucasian Knot, 2025), effectively matching Armenia's earlier strategic agreement with the U.S. signed in January with President Biden.

On the positive side, the Washington agreements ended, at least temporarily, President Aliyev's incessant demands for new preconditions and suspended imminent threats of an Azerbaijani aggression against sovereign Armenian territory. However, durable peace remains elusive due to major gaps in the agreed documents.

First, the right of return for ethnically cleansed Armenians from Nagorno-Karabakh was not addressed. Second, destruction of Armenian cultural heritage in Nagorno-Karabakh was ignored. Third, the fate of 23 Armenian hostages in Baku undergoing sham trials without proper legal representation was overlooked (Christian Solidarity, 2025), though on 14 January 2026 four Armenians held in Baku were exchanged with two Syrian mercenaries who had fought in the recent wars on behalf of Azerbaijan and were jailed in Armenia. With such emotional issues pending, even if a formal agreement is eventually signed, peace between Armenian and Azerbaijani peoples will remain elusive.

Fourth, the Peace Agreement's Article XV requiring withdrawal of interstate lawsuits should have extended to intrastate disputes, which could have freed the Armenian hostages in Baku. With accountability for aggression and ethnic cleansing at issue, Armenia denies the intent to withdraw interstate lawsuits, but Article XV's language is clear (Armenpress, 2025). Although it is impossible to sweep these issues under the proverbial rug and expect genuine peace, the critical question is whether Armenia had effective bargaining chips with which to negotiate a better deal, or whether it could have used its weak hand more effectively.

Fifth, the detailed provisions for the "Trump Route for International Peace and Prosperity" (TRIPP) crossing Armenia's southern Syunik region and the "reciprocal" rights for Armenia to transit through Azerbaijani territory remain undefined. TRIPP effectively supersedes Article 9 of the November 2020 tripartite ceasefire agreement's provision for a "transport connection" between mainland Azerbaijan and its

Nakhichevan exclave, which President Aliyev has renamed the “Zangezur corridor” (Armenian National Inst., 2020).

The Armenian opposition’s total rejection of TRIPP is misplaced, as it is part of the Middle Corridor initiative and could substantially benefit Armenia if endowed with appropriate details and safeguards. Intense negotiations between Armenia and the U.S. to define the TRIPP parameters (Eurasianet, 2025) culminated in an agreement on 13 January 2026, giving the U.S. 74% stake for 49 years (and 51% for 50 years thereafter) in a consortium that will govern the TRIPP. While the agreement provided some details on how Armenia’s sovereignty over the route will be maintained, important questions about details remain unanswered (Civilnet 2026). Significantly, Armenia’s reciprocal rights for transit through Azerbaijan have been left out altogether.

Sixth, if TRIPP is allowed to serve as a U.S. geopolitical tool aiming to isolate Moscow and Tehran from the South Caucasus, as it is perceived, it will likely fail. While Russia and Iran have responded to the TRIPP announcement with moderation, they remain concerned about its strategic implications (AlJazeera, 2025).

Seventh, Article XII of the Peace Agreement requires Armenia to amend its constitution removing clauses objectionable to Azerbaijan. This would require a new constitution and approval in a referendum by a majority vote representing at least one-quarter of registered voters in accordance with Armenia’s Constitution, Article 207 (Constitute, undated). The referendum could fail as the demand for change is perceived as Baku bullying again (Khorrami, 2025).

Eighth, some 240 km² of sovereign Armenian territory remains under Azerbaijani occupation since 2021. While Article VI of the Peace Agreement references border delimitation and delineation, it fails to set deadlines (Hovhannisyan, 2025).

Ninth, Article VII of the Peace Agreement stipulates parties shall not deploy forces of any third party along their mutual border. Azerbaijan is likely to invoke this provision to demand an end to the EU border observer mission in Armenia, though the mission does not constitute a “force” in the military sense. Withdrawing the EU observers before borders are demarcated and a peace agreement is fully ratified would likely jeopardize Armenia’s precarious border security.

The Next Decade

These issues will be debated hotly in the period leading to the June 2026 parliamentary elections in Armenia.

In the next decade, Armenia can expect a future with both economic opportunities and persistent geopolitical challenges. Success will depend on effective remedies to the four existential challenges. For a small state, failure to break with its past trajectory and to face the future with sobriety could result not only in further democratic backsliding but also in catastrophic territorial losses. Armenia must tread the next decade with extreme caution and wisdom.

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Biographies

Dr. David Akopyan

David Akopyan had dual career - PHD in physics studied complex systems, after 27 years worked for the UN in 15 countries across many regions. Last 10 years of his UN career spent in Afghanistan, Somalia and Syria, worst crisis affected countries, holding leadership positions as UN Development Program Deputy Director, Country Director and Resident Representative. He is also AUA (America University of Armenia), 2019 distinguished alumnus. Early 2021 David retired from the UN and joined the Artsakh Government as the Principal advisor to State Minister helping to coordinate humanitarian and development assistance. He is also an ex officio advisor to the President of Armenia, the Chair of the Board of Trustees of reArmenia foundation, member of APRI (Applied Policy Research Institute/AGBU) Board of directors and the Insurance Foundation of servicemen.

Dr. Stephan Astourian

Stephan H. Astourian, Ph.D., is currently a Professor in the College of Humanities and Social Sciences at the American University of Armenia. He is also the Director of its Turpanjian Institute of Social Sciences. Prior to moving to Armenia, Astourian was the founder of the Armenian Studies Program at U.C. Berkeley and its subsequent William Saroyan Director.

Dr. Hrair Balian

Hrair Balian, Peacebuilding practitioner since 1990. Author, *Anatomy of Peacemaking: Nagorno-Karabakh Conflict & Missed Opportunities*, March 2026, Palgrave Macmillan. Served in leadership positions at the UN, OSCE & NGOs (International Crisis Group, Geneva Center for Security Policy, Carter Center). Worked on conflict transformation, elections & human rights in the Balkans, Eastern Europe, North & South Caucasus, Central Asia, Middle East & Africa. Published articles. Adjunct Professor (2008-2018), conflict resolution, negotiations & mediation, Emory University, School of Law. Juris Doctor (1985), Doctor of Laws (Honoris Causa - 2009).

Dr. Hriar Cabayan

Dr. Hriar Cabayan currently holds a Visiting Scientist Position at the Lawrence Livermore Laboratory. He joined the laboratory in 1977 and worked on nuclear weapons effects, Strategic Defense Initiative related efforts, and directed energy programs. In 1997 he joined the Joint Staff/J-39 as a Science Advisor. In 2007, He received the Joint Meritorious Civilian Service Award from the Office of the Chairman, Joint Chiefs of Staff in 2007 and again in 2019. He returned to Lawrence Livermore Laboratory in October 2019 and retired in 2020. Dr. Cabayan received his doctorate degree from the University of Illinois in Urbana, Illinois. After graduating, he taught mathematical physics for four years at New York University's Courant Institute of Mathematical Sciences and McGill University.

Artin DerSimonian

Artin DerSimonian is a junior research fellow in the Eurasia Program at the Quincy Institute for Responsible Statecraft, where his work focuses on Russian foreign policy in the former Soviet Union and U.S.-Russia relations. He earned a Master of Science from the University of Glasgow in Russian, East European, and Eurasian Studies.

Anna Gevorgyan

Anna Gevorgyan received her MA degree in Iranian Studies from the Chair of Iranian Studies In 2009 (Department of Oriental Studies, Yerevan State University). Since September 2009 she has been a researcher at the YSU and at the Center for Civilization and Cultural Studies. In 2013, she was a visiting scholar at Arizona State University School of Social Transformation. She has been teaching at YSU Chair of Applied Sociology since 2014. She was the head of the Scientific-Educational Center at the National Defense Research University, MoD, RA, from December 2016 to June 2018 and co-authored and coordinated an inter-agency executive course for Armenian military servants. Starting from June 2018 she served as an adviser to the Secretary of the Security Council, RA, and left the position in December 2018. She has authored several articles on the internal politics of contemporary Iran, Iran's regional policy, Armenia-Iran relations, regional security issues, as well as women's issues in Iran, women's rights in Islam et cetera".

Dr. Alexander Iskandaryan

Dr. Alexander Iskandaryan is a political scientist, the Director of the Yerevan-based Caucasus Institute. His areas of study are ethnopolitical conflicts, post-Communist transformations and nation building in the former USSR in general and in the Caucasus in particular. He has published and spoken on the emergence of post-Soviet institutions, elites, and identities; he has also conducted and supervised research on conflicts, migrations, discourses, media development and cross-border integration.

Dr. Nerses Kopalyan

Dr. Nerses Kopalyan is an associate professor-in-residence of Political Science at the University of Nevada, Las Vegas, specializing in international security, geopolitics, political theory, and philosophy of science. He has researched polarity, superpower relations, and security studies. He is the author of *World Political Systems After Polarity* (Routledge, 2017), the co-author of *Sex, Power, And Politics* (Palgrave Macmillan, 2016), co-author of *Latinos in Nevada: A Political, Social, and Economic Profile* (Nevada University Press, 2021), and co-author of *Armenia, Azerbaijan, and the 2020 Nagorno-Karabakh War* (Taylor and Francis, forthcoming 2023). He is also a regular contributor to the EVN Report with over 50 articles and contributed publications to *Le Figaro*, *The Times of Israel*, and *The National Interest*. His research and academic publication concentrate on geopolitical and great power relations within Eurasia, its impact on small state security, and the broader implications for democratic breakthroughs within authoritarian orbits. He has conducted extensive field work in Armenia on the country's security architecture and its democratization process. He has authored several policy papers for the Government of Armenia and served as voluntary advisor to various state institutions.

Dr. Anatol Lieven

Dr Anatol Lieven is the director of the Eurasia Program and the Andrew Bacevich chair in American Diplomatic History at the Quincy Institute for Responsible Statecraft. He

was formerly a professor at Georgetown University in Qatar and in the War Studies Department of King's College London. He also served as a member of the advisory committee of the South Asia Department of the British Foreign and Commonwealth Office and of the academic board of the Valdai discussion club in Russia. He holds a B.A. and Ph.D. in history and political science from Cambridge University in England.

From 1985 to 1998, Lieven worked as a journalist in South Asia, the former Soviet Union and Eastern Europe and covered the wars in Afghanistan, Chechnya and the southern Caucasus. From 2000 to 2007 he worked at think tanks in Washington DC.

Lieven is author of several books on Russia and its neighbors including *The Baltic Revolutions: Estonia, Latvia, Lithuania and the Path to Independence* (Yale University Press, 1993), *Chechnya: Tombstone of Russian Power?* (Yale University Press, 1998), and *Ukraine and Russia: A Fraternal Rivalry* (US Institute of Peace, 1999). His book *Pakistan: A Hard Country* (Penguin UK, 2011) is on the official reading lists for US and British diplomats serving in that country. His latest book, *Climate Change and the Nation State* (Oxford University Press, 2020), was published in March 2020 and in an updated paperback edition in Fall 2021.

Garo Paylan

Garo Paylan is a Visiting Scholar at the Carnegie Endowment for International Peace in Washington. He previously served as a member of the Turkish Parliament from 2015 to 2023, where he worked on democratization, minority rights, and regional peace. Paylan has long been engaged in efforts to normalize relations between Türkiye and Armenia. His current work focuses on Türkiye, Armenia, Azerbaijan, and pathways to sustainable peace and regional cooperation in the South Caucasus.

Dr. Tigran Yegavian

Tigran Yegavian is a scholar and lecturer in international relations, currently teaching at Schiller International University and at the École militaire in Paris. He is a PhD candidate at the University of Lyon II, where his research focuses on the contemporary geopolitics of the Middle East and the South Caucasus. A graduate of Sciences Po

Paris and trained as an orientalist, he has developed recognized expertise on ethnic and religious minorities in these regions.

His work lies at the intersection of international relations, history, and cultural studies, and he regularly contributes analyses to leading French journals and think tanks. The author of around ten books, he has notably published works on Armenia, Christian minorities in the Middle East, and the geopolitical transformations of the broader Middle Eastern and Caucasian spaces.