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Challenges to Russia's influence in the South Caucasus

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Based in London and Washington, D.C., NEST Centre brings together the best expertise on Russia and the surrounding region. Its mission is to identify the forces shaping Russia's long-term future, analyse their impact and develop strategies to bring about peaceful and positive development of the country.

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Cover image: A view of the Verkhny Lars customs checkpoint between Georgia and Russia. (Photo by Daro Sulakauri /Getty Images)

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Executive summary

- Russia's full-scale invasion of Ukraine and the Second Karabakh War have triggered a renewed round of geopolitical competition for influence in the South Caucasus. While Russia, Iran, and Türkiye remain the principal regional powers, the United States, the European Union, and China are also actively engaged.
- Russia seeks to consolidate its influence in the South Caucasus and to deter Georgia and, increasingly, Armenia from aligning more closely with the West.
- In Georgia, continuing democratic backsliding and the formal suspension of the EU integration policy until 2028 by the ruling Georgian Dream party have resulted in the freezing of the country's EU accession process and the suspension of its strategic partnership with the US.
- Although Armenia remains economically reliant on Russia – particularly for natural gas – the outcome of the Karabakh conflict has significantly damaged Moscow's credibility as a security guarantor. As a result, Yerevan has begun to pursue closer ties with the US, the EU, and Türkiye.
- Azerbaijan, due to its close strategic alignment and cultural affinity with Türkiye, remains the South Caucasus state where Russian influence is weakest. Joint energy projects between Azerbaijan, Georgia, and Türkiye may further erode Russian predominance in the region, while China is increasingly asserting its presence through the Belt and Road Initiative.
- The war in Ukraine may not only divert Russia's attention from the South Caucasus, but also heighten the region's strategic importance to the West as a conduit for diversifying energy supplies and securing Europe's southern flank.

Introduction

The strategic significance of the South Caucasus is obvious. Situated at the easternmost edge of Europe, the region provides the shortest overland route to Central Asia, and onward to China and East Asia – offering an alternative to transit corridors through Russia and Iran. Few regions combine such diverse geopolitical and geoeconomic potential. The South Caucasus is also rich in fossil fuel resources and boasts a well-developed transport and energy infrastructure that channels energy supplies to Western markets. A relatively well-educated yet low-cost labour force further enhances its potential competitive advantage.

THE SOUTH CAUCASUS REGION

A region marked by diverging alliances, strategic rivalries and external power competition in the wake of Russia's declining influence



In short, many of the necessary conditions are in place for the South Caucasus to assume a significant role on the international stage, including as a key component of the Euro-Atlantic security architecture.

CHALLENGES TO RUSSIA'S INFLUENCE IN THE SOUTH CAUCASUS

Owing to its strategic location, the South Caucasus has long served as a battleground for the conflicting interests of global powers. Since the collapse of the Soviet Union, the United States, the European Union, and, more recently, China have joined the traditional regional actors – Russia, Türkiye, and Iran – in vying for influence in the region.

The region has been a champion in realising ambitious international infrastructure projects, including the Baku–Tbilisi–Supsa, Baku–Tbilisi–Ceyhan and Baku–Tbilisi–Erzurum oil and gas pipelines, as well as the Baku–Tbilisi–Kars railway. The significance of these initiatives extends well beyond the South Caucasus, contributing to European energy security and strengthening connectivity across Eurasia.

At the same time, important opportunities have been missed. After the collapse of the Soviet Union, Armenia, Azerbaijan and Georgia had the potential as independent countries to create favourable conditions for shared development, and to harness their lucrative geopolitical and geostrategic position, as well as their abundant natural resources and interconnected populations that have a shared understanding of regional challenges.

Instead, for decades, the region became mired in confrontation. Russia skilfully exploited historical grievances and mutual suspicions to manipulate all three states, employing a classic imperial strategy of ‘divide and rule’ to entrench its influence.

Encouragingly, the resolution of the Karabakh conflict presents an opportunity for joint ventures aimed at promoting regional prosperity and sustainable development – this time, with Armenia’s inclusion. Should the South Caucasus evolve into a cohesive space of stability and integration, its inherent advantages will be amplified, attracting further investment and opening up new opportunities for growth.

Armenia and Azerbaijan announced in March 2025 that they had completed work on the text of a peace agreement. If Armenia can change its constitution to renounce what Azerbaijan interprets as claims on internationally recognised Azerbaijani territory, the signing of the agreement would end over three decades of confrontation between the countries and stimulate regional consolidation. It would pave the way for a trilateral cooperation platform in the South Caucasus – unlocking the region’s potential and enhancing its visibility and standing within the international system.

On 10 July 2025, a meeting between the delegations of Armenia and Azerbaijan took place in Abu Dhabi, lasting more than four hours, including a 20-minute tête-à-tête between President Aliyev and Prime Minister Pashinyan.

According to both sides, negotiations contributed to further strengthening of trust between the parties and brought the signing of a peace treaty closer. On 8 August 2025, President Trump received both leaders at the White House and they issued a declaration noting the initialing of the Agreement on Establishment of Peace and Inter-State relations between the

two countries. This included a commitment to develop 'unimpeded connectivity' between the main part of Azerbaijan and its Nakhchivan Autonomous Republic via Armenian territory.¹

Russian revanchism in the South Caucasus

Putin's Russia has emerged as the principal threat to European security, having initiated the first wars on the continent in the 21st century – against Georgia in 2008 and against Ukraine in 2014, culminating in the full-scale invasion of 2022.

Since 2022, it has become clear that Moscow seeks to reassert control over territories that were once under its rule: the former Soviet Union and, if possible, the countries that belonged to the Warsaw Pact. While the West welcomed the end of the Cold War and shifted its focus and resources elsewhere, the Russian security policy elites did not fully accept the independence of the former Soviet republics and harboured ambitions to resurrect Russia's influence across much of the post-Soviet space.

The Kremlin believes that a fragmented neighbourhood facilitates the pursuit of its goals. This approach is evident in the South Caucasus, which has been a focus of Russia's revisionist agenda since the collapse of the Berlin Wall. All conflicts in the region since that time have been instigated or exacerbated by Moscow. Securing full control over the region is key to advancing Russia's interests in multiple areas:

- Consolidating dominance over the Black Sea, a Moscow-controlled basin during the Cold War, with Türkiye as the only NATO littoral state.
- Controlling East–West transport, energy, and communication corridors linking the European markets with Central and East Asia.
- Securing authority over the North Caucasus.
- Rebalancing power vis-à-vis Türkiye and deepening strategic ties with Iran.
- Strengthening its presence in the Middle East, particularly after the fall of the Assad regime in Syria.

The Kremlin's use of conflicts as a tool for diplomatic leverage has been effective in blocking Georgia and Ukraine from joining NATO. However, by occupying territory belonging to its neighbours, Russia forfeited any claim to being a reliable partner – undermining its credibility in the view of those states.

Over the past 20 years, Russia occupied Abkhazia and South Ossetia, annexed Crimea, and created and supported proxy separatist regimes in eastern Ukraine. Yet rather than securing long-term influence, the Kremlin's aggression pushed Tbilisi and Kyiv to accelerate their pursuit of Euro-Atlantic integration.

In response, Moscow launched a campaign of hybrid warfare in Georgia, aimed at steering the country back into its orbit, and initiated a full-scale invasion of Ukraine to prevent it from leaving Russia's zone of influence. The outcome of this aggressive strategy remains uncertain, and the final chapter of this grim contest has yet to unfold.

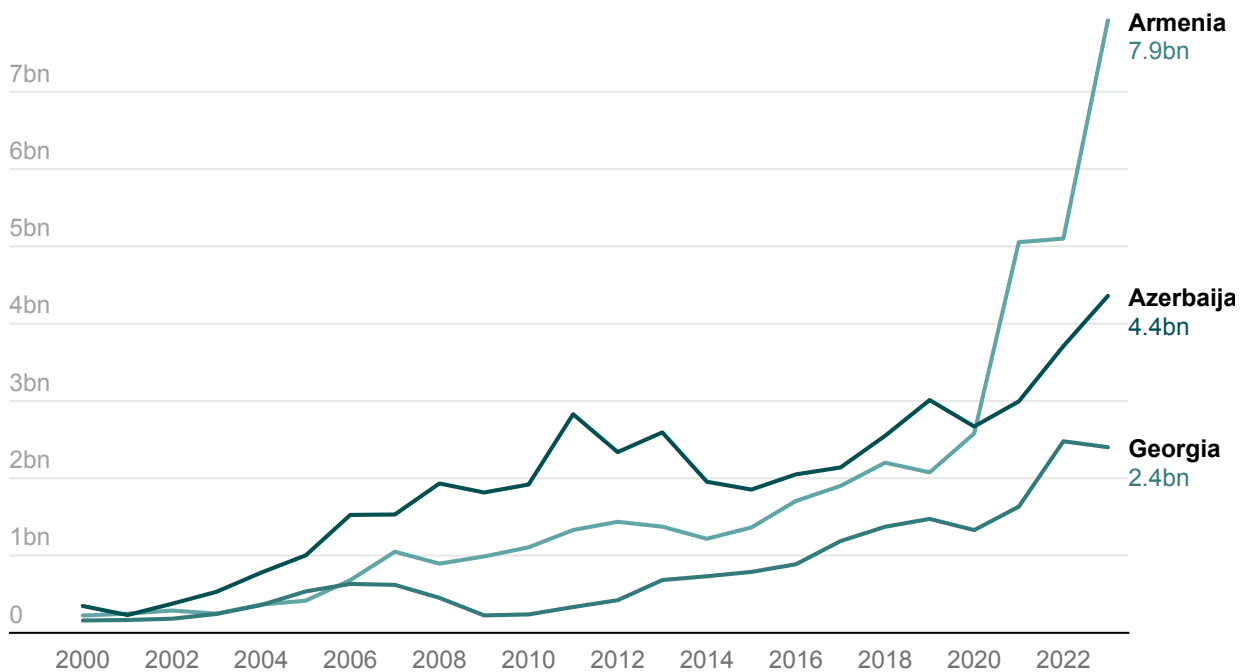
Russian economic influence in the South Caucasus

Russia regards a strong presence in regional economic initiatives – particularly in the energy, transport and communications sectors – as a strategic priority in the South Caucasus. While the region's states have expanded their economic ties with other markets, in all three cases, their trade with Russia has also grown significantly over the past 15 years as a share of overall foreign trade.

In 2010, Armenia's trade with Russia was worth \$1.1 billion (23.8 per cent of its overall foreign trade).² In 2019, it was \$2 billion (27 per cent).³ In 2023, it was \$7.9 billion (37.18 per cent).⁴

In 2010, Azerbaijan's trade with Russia was worth \$1.9 billion (6.88 per cent of its overall foreign trade).⁵ By 2019 the value of trade with Russia had doubled to \$3 billion and amounted to nine per cent of overall foreign trade.⁶ In 2023, it was 4.4 billion (8.52 per cent).⁷

VALUE OF TRADE WITH RUSSIA, 2000–2023, \$US



Source: World Bank (2000–2022, except Armenia 2022), Statistical Committee of Armenia (2022–2023), National Statistics Office of Georgia (2023–2023), State Statistical Committee of the Republic of Azerbaijan (2023–2023)

CHALLENGES TO RUSSIA'S INFLUENCE IN THE SOUTH CAUCASUS

In the aftermath of the five-day war in 2008, Georgia's trade with Russia in 2010 was \$238.4 million or 3.45 per cent of overall foreign trade.⁸ By 2019, trade with Russia was worth \$1.47 billion (11 per cent).⁹ In 2023, it was \$2.4 billion (11 per cent).¹⁰

All three countries have significant diaspora populations in Russia. Some estimates suggest that there may be 2.5 to 3 million Armenians living in Russia¹¹ and 2.5 million Azerbaijanis.¹² The estimated number of Georgians in Russia is much lower – 300-500,000.¹³ Parts of these populations provide remittances that are significant sources of revenue for their home countries.

Amid the sweeping sanctions imposed by the US and the EU on Russia after its full-scale invasion of Ukraine in 2022, any viable transport connection has become critical for Moscow. The Comprehensive Strategic Partnership Treaty signed between Russia and Iran on 17 January 2025 includes plans for the development of the 'North-South' international transport corridor connecting India with Russia via Iran and Azerbaijan.¹⁴

Armenia is the only South Caucasus country that is a member of the Eurasian Economic Union, and as the data shows, it remains the most economically dependent on Russia. At the same time, Armenia's exports to third countries are increasing rapidly, suggesting a notable level of re-export of Russian goods.

Nevertheless, Yerevan is deepening its engagement with both the EU and the US. In April 2025, Armenia ratified a draft law on EU integration,¹⁵ while in January, it signed a Charter on Strategic Partnership with the United States.¹⁶ Against the backdrop of continued economic reliance on Russia, Armenia appears to be entering the early stages of a carefully balanced recalibration of its diplomatic relations.

As noted above, Russia's invasion of Georgia in 2008 led to a sharp decline in bilateral trade, with Russia dropping out of Georgia's top 10 trading partners. However, under the Georgian Dream government that came to power in 2012, Russia's share in Georgia's foreign trade has steadily increased, eventually rising to second place after Türkiye. Notably, shortly after its 2012 electoral victory, the Georgian Dream administration – pledging to normalise relations with Moscow – established an informal channel of communication known as the 'Abashidze–Karasin dialogue'. This format was designed to explore avenues for restoring bilateral cultural and economic ties in the absence of formal diplomatic engagement.

At present, the structure of trade between Georgia and Russia highlights Georgia's dependence on two key commodity categories. On the import side, 97 per cent of Georgia's grain and flour imports came from Russia in 2023.¹⁷

On the export side, Georgia remains critically reliant on the Russian market for wine and spirits – long-standing staples of its export portfolio. In 2024, Russia accounted for \$183 million of Georgia's \$276 million of wine exports (approximately 66 per cent), and \$155 million of \$288 million of spirits exports (around 54 per cent).¹⁸

It should be noted that there are some striking discrepancies in the official trade statistics of the three South Caucasus countries, particularly in the case of Georgia's exports to Armenia and Azerbaijan. In the case of Armenia, Georgia records exports worth \$787 million, while Armenian data shows only \$126 million of imports from Georgia. For Azerbaijan, the gap is similarly large: Georgia reports \$862 million in exports, whereas Azerbaijan acknowledges only \$122 million of imports.

A partial explanation lies in the possible re-export of vehicles and trucks to Russia, where the direct import of vehicles manufactured in the US and Europe is banned by Western sanctions. At the same time, exports to Kyrgyzstan and Kazakhstan have surged since the start of the full-scale war in Ukraine.¹⁹ It is believed that Georgia is functioning as a hub for the indirect re-export of sanctioned vehicles to the Russian market via third countries.²⁰

Iran

Russia is engaged in competition for influence in the South Caucasus with both global and regional players. Among these, Iran stands out as a natural partner for Moscow. The recently signed Comprehensive Strategic Partnership Agreement between the two underscores this alignment. The document explicitly references 'common military threats' (Article 5, paragraph 4) and affirms a shared commitment to resisting sanctions imposed upon them (Article 19, paragraphs 1 and 3). Their stance on the South Caucasus is clearly articulated in Article 12: 'The Contracting Parties shall promote the strengthening of peace and security in the Caspian region, Central Asia, Transcaucasia, and the Middle East, and shall cooperate to prevent interference in the said regions and the destabilising presence of third states there, and shall exchange opinions on the situation in other regions of the world.'²¹

This language reflects a joint ambition to consolidate regional influence while opposing the involvement of Western powers – framing the South Caucasus not only as a sphere of interest but as a frontline in their broader geopolitical confrontation with the West.

The intentions outlined by the signatories of the above document are clear but difficult to realise. These ambitions appear unrealistic since they face opposition from major global actors – the US, the EU, and, to a lesser extent, China – as well as from the region's most influential player, Türkiye, whose presence in the South Caucasus has steadily expanded since the collapse of the Soviet Union. Moscow's reluctance to come to Tehran's aid during the war with Israel in June 2025 culminated in the bombing by the US of facilities in Iran allegedly used for the development of a nuclear weapon.

Tehran views the strategic triangle formed by Türkiye, Georgia, and Azerbaijan with unease. The deepening integration between Ankara and Baku, culminating in a declaration of 'allied relations' in 2021,²² is a particular source of concern. Iran's interest in developments in Azerbaijan is heightened by the presence of a sizeable Azerbaijani ethnic minority within its borders.

Notably, after the outbreak of hostilities between Armenia and Azerbaijan in September 2020, Iran publicly reaffirmed its support for Azerbaijan's territorial integrity, while denying speculation that it was covertly aiding Yerevan. Tehran also expressed a willingness to mediate in the conflict.²³

The resolution of the Karabakh conflict has made the launching of the Zangezur (Syunik) corridor connecting Türkiye and Azerbaijan a realistic prospect. The ceasefire declaration signed on 10 November 2020 by the Presidents of Azerbaijan and Russia and the Prime Minister of Armenia stipulated the creation of a transport route between mainland Azerbaijan and its Nakhchivan exclave via Armenian territory.²⁴ However, this project

has met with resistance from Tehran. On 11 March 2022, Iran and Azerbaijan signed a Memorandum of Understanding (MoU) to build new railway, highway, communication, and energy supply lines connecting Azerbaijan to Nakhchivan through Iranian territory. The MoU outlines the construction of four bridges over the Araz River, including two motorways (with a pedestrian crossing) and two railway lines.

In August 2024, Russian Foreign Minister Lavrov accused Armenia of obstructing the implementation of the Zangezur (Syunik) corridor agreement. This provoked a strong reaction from Tehran: the Ministry of Foreign Affairs summoned the Russian Ambassador, and senior Iranian officials issued critical public statements.²⁵ The proposed transport and communications route between Türkiye and Azerbaijan – bypassing Iran – would, if realised, significantly diminish Tehran’s influence in the South Caucasus.

Meanwhile, on 11 February 2025, President Aliyev approved the Agreement on Cooperation for the Development of Transit Freight Transportation along the ‘North-South’ International Transport Corridor, signed between Azerbaijan and Russia in Moscow on 21 December 2024.²⁶

Türkiye

Tsarist Russia pushed Türkiye out of the South Caucasus in the early nineteenth century. However, the collapse of the Soviet Union allowed Ankara to reassert itself and take on a defining role in the region – fostering cooperation and offering a viable alternative to Russian dominance. As a NATO member, Türkiye serves as a direct link between the South Caucasus and the Alliance.

Baku quickly emerged as Ankara's natural ally. The two countries have built their relationship on the principle of 'one nation, two states', and over the decades have developed a deep strategic partnership spanning the political, economic, energy, defence, and security domains. They also closely coordinate their foreign policies and often adopt common positions in international forums.

Türkiye's re-emergence as a key regional actor has had a significant effect on all three South Caucasus states. Its military cooperation with Baku – alongside sustained political and diplomatic support before, during, and after the Second Karabakh War – was instrumental in determining the outcome of this conflict. This deepened the Turkish–Azerbaijani alliance, which was formally codified in the Shusha Declaration signed in June 2021.²⁷

As a result of coordinated efforts by Baku and Ankara, Armenia has been excluded from regional initiatives led by Azerbaijan, Georgia, and Türkiye, and continues to face a blockade imposed jointly by Türkiye and Azerbaijan. For decades, Georgia has served as Armenia's only overland access route to both Russia and the wider Western world.

In contrast to Yerevan, Tbilisi has cultivated strategic partnerships with both Ankara and Baku. This trilateral Azerbaijan–Georgia–Türkiye cooperation has produced major infrastructure projects, including the Baku–Tbilisi–Supsa, Baku–Tbilisi–Ceyhan and Baku–Tbilisi–Erzurum pipelines, as well as the Baku–Tbilisi–Kars railway.

Recent geopolitical shifts have further reinforced Ankara's standing in the South Caucasus while eroding Moscow's influence. Diplomatic ties between Russia and Georgia remain severed following the 2008 war while relations between Moscow and Yerevan have deteriorated in the aftermath of the second Karabakh conflict, and tensions between Russia and Azerbaijan escalated after a Russian air defence system shot down an Azerbaijani passenger aircraft over Grozny on 25 December 2024.

The US and the EU

The United States has played an active role in the South Caucasus since the collapse of the Soviet Union, serving as a key driver behind the region's strategic infrastructure development. It was among the earliest proponents of trans-Caspian transport and energy corridors, with the South Caucasus forming a critical link. These corridors were designed to facilitate the delivery of Central Asian hydrocarbons to Western markets and to diversify trade routes between Europe and Asia.²⁸

Until recently, Tbilisi has been Washington's principal regional partner. The US supported Georgia in strengthening state institutions, implementing democratic reforms, and modernising its defence and security sectors. As the only NATO-aspirant country in the region, Georgia actively contributed to Western security efforts – participating in the US-led mission in Iraq and becoming the largest non-member troop contributor to NATO's mission in Afghanistan.

The US alongside the EU played a critical role in securing the ceasefire agreement following Russia's invasion of Georgia in 2008. A pivotal moment came when President George W. Bush ordered the deployment of the flagship of the US Sixth Fleet, on a humanitarian mission to Georgia – accompanied by two additional US Navy vessels and military transport aircraft. The assertive move is widely regarded as having halted the advance of Russian forces.

The enhanced cooperation culminated in the signing of the US–Georgia Charter on Strategic Partnership on 9 January 2009. The Charter's comprehensive agenda, encompassing democracy, defence and security, economic cooperation, trade and energy, and people-to-people and cultural exchanges, reflected the depth and strategic scope of the bilateral relationship.

The EU formalised its engagement in the South Caucasus through Partnership and Cooperation Agreements signed with all three regional states in 1996. This framework laid the foundation for structured bilateral relations. In 2004, the region became part of the European Neighbourhood Policy, injecting new momentum into the EU's cooperation with Armenia, Georgia, and Azerbaijan.

The Eastern Partnership launched in 2009 marked a significant deepening of this engagement. As arguably the EU's most substantial regional initiative, the policy was designed to foster closer political and economic ties with six countries: Ukraine, Georgia, Moldova, Armenia, Azerbaijan, and Belarus. Of these, Ukraine, Georgia, and Moldova have since signed Association Agreements and Deep and Comprehensive Free Trade Agreements with the EU – anchoring their trajectory towards deeper integration with European structures.

Moscow reacted swiftly and harshly to the launch of the Eastern Partnership. At the Brussels Forum in March 2009, Russian Foreign Minister Lavrov remarked:

‘We are accused of having spheres of influence. But what is the Eastern Partnership, if not an attempt to extend the EU’s sphere of influence, including to Belarus?’²⁹

The Kremlin’s opposition was not limited to rhetoric. In 2013, Russia successfully pressured Yerevan to abandon its planned Association Agreement with the European Union – despite the fact that negotiations had been fully concluded. Instead, Armenia joined the Moscow-led Eurasian Economic Union. A similar attempt to coerce the Ukrainian government into rejecting its EU integration path triggered the Maidan protests and ultimately led to the ousting of President Yanukovich.

Nevertheless, in November 2017, Armenia and the European Union signed a Comprehensive and Enhanced Partnership Agreement, which entered into force on 1 March 2021. It elevates EU–Armenia relations to a new level of partnership with a focus on strengthening trade ties, and aligning Armenian legislation and regulatory standards with the EU acquis.³⁰

The US and the EU do not always act in concert in the South Caucasus – and coordination with Türkiye is virtually absent. Yet, if the US, EU, and Türkiye were to align their policies in the region, Russia’s prospects for influence would be greatly diminished. Trans-regional transport and energy infrastructure would be a particularly promising area for such strategic coordination.

China

China is steadily expanding its presence in the South Caucasus, albeit with less visibility than other actors. It has established solid political ties with all three regional states and continues to grow its trade turnover, investment portfolio and project footprint. A distinguishing feature of China's approach is its ability to maintain stable relations with Armenia, Azerbaijan, and Georgia, at the same time. Unlike Moscow, China is perceived as operating within the framework of international law, and is largely seen as a pragmatic economic actor rather than a politically driven power. Beijing has no history of colonial involvement in the region, enhancing its reputation as a neutral and commercially motivated partner.

China's broader vision of global engagement is encapsulated in initiatives such as the Global Civilisation Initiative, the Global Development Initiative, and Global Security Initiative. The Belt and Road Initiative (BRI), China's flagship connectivity project, complements these frameworks and provides a platform through which South Caucasus countries – along with Türkiye – can participate in the ambitious Middle Corridor. This transport route aims to link China to Europe via Central Asia and the South Caucasus, which has been significantly disrupted by EU sanctions following Russia's full-scale invasion of Ukraine in February 2022.

Alongside deteriorating relations with the US and the EU, the Georgian government has articulated a new, 'multi-vector' foreign policy as a potential alternative to its Western-centric orientation. On 31 July 2023, during Prime Minister Irakli Gharibashvili's visit to Beijing, Georgia and China issued a joint statement establishing a strategic partnership. They also signed agreements under the BRI framework. A year later, on 3 July 2024, Azerbaijan followed suit, signing its own strategic partnership declaration with Beijing.³¹

The ruling Georgian Dream party insists that the 'multi-vector' approach does not contradict Georgia's long-standing Euro-Atlantic aspirations. During a parliamentary debate on 20 October 2023, Foreign Affairs Committee Chair Nikoloz Samkharadze reaffirmed that EU and NATO membership remain priorities, while describing China as a 'natural partner'. Yet the sequencing of official meetings – such as newly appointed Prime Minister Irakli Kobakhidze meeting the Chinese Ambassador before his US counterpart – might be perceived as sending a specific diplomatic signal. As Kobakhidze pointedly remarked, 'China's interest in Georgia is growing, while that of the US is diminishing.'³²

Georgia is among the countries that have openly expressed a strong interest in participating in the BRI. Thanks to its strategic location on the southeast edge of the European continent, Georgia can serve as a bridge between Asian and European markets. Tbilisi sees clear benefits in becoming a BRI transit hub, expecting it to boost domestic infrastructure and strengthen Georgia's role in regional trade.

CHALLENGES TO RUSSIA'S INFLUENCE IN THE SOUTH CAUCASUS

This concept gained particular significance following the suspension of the Northern Corridor through Russia, as Moscow came under severe EU sanctions in response to its invasion of Ukraine.

Georgia's BRI involvement requires balancing closer ties with China and its strategic partnership with the EU. Although the formal EU integration process has been suspended until 2028, EU membership is still a constitutional commitment for the Georgian government.

European leaders acknowledge that the EU's official 2019 tripartite characterisation of China as a 'partner, competitor, and systemic rival' has tilted increasingly toward rivalry. Trade remains the key area of cooperation, where Georgia can contribute constructively. Beyond its advantageous geopolitical location, it is the only country in the region to hold free trade agreements with both the EU and China.

The Middle Corridor ultimately aims to accommodate a significant share of trade between China and Europe, with total cargo volume already estimated at \$730 billion in 2023.³³ However, according to the World Bank, transit volumes along the corridor may reach only 11 million tonnes by 2030 – highlighting the gap between ambition and current capacity.³⁴

Georgia's strategic partnerships with Türkiye and Azerbaijan have already produced a robust operational infrastructure well-suited to advancing the BRI. The development of the Anaklia Deep Sea Port is expected to greatly enhance Georgia's role in the Middle Corridor. Beijing has expressed strong interest in the project, and in May 2024, the Georgian government awarded a 49 per cent stake in the port to a Chinese-Singaporean consortium. Both participants – China Communications Construction Company Limited and China Harbor Investment – are state-owned enterprises.³⁵

The BRI has been met in Georgia with a mixture of enthusiasm and scepticism. As elsewhere, proponents argue that it offers considerable potential to stimulate economic growth in participating countries by opening new trade routes, attracting investment, and promoting cultural exchange. However, critics have raised concerns regarding debt sustainability, limited transparency, and potential environmental harm. One frequently cited issue is the opacity surrounding the terms and conditions of BRI-related loan agreements, which are often difficult to access or scrutinise.

The BRI presents both opportunities and challenges for Georgia. Projects under its framework should be carefully assessed, ideally in coordination with the EU. The decision by Italy – previously the only G7 country to join the BRI – to withdraw from the Initiative at the end of 2023 is cautionary. According to the Italian government, the BRI failed to deliver on its promises and did not meet expectations.

Geopolitical shifts

Two major developments – Russia’s full-scale invasion of Ukraine and the Second Karabakh War – have had a direct, country-specific, and transformative impact on the South Caucasus. Since 2020, the region has undergone a profound geopolitical reconfiguration driven by the reverberations of these crises. The transformation is still unfolding shaped by the competing interests of external actors, while its outcome depends on the evolving dynamics within the region and the outcome of the war in Ukraine.

Russia’s assault on Ukraine has shaken the foundations of the rules-based international order, posing the most serious challenge to the Euro-Atlantic community since the end of the Cold War. In response, the EU has accelerated its strategic thinking on enlargement and raised expectations that it will be in a position to admit new members by 2030. Georgia’s designation as an EU candidate member in December 2023 carries strategic weight not only for Tbilisi but for the wider South Caucasus.

At the same time, NATO’s admission of Finland and Sweden, alongside its evolving posture on Ukraine, will have significant implications for Georgia’s Euro-Atlantic integration ambitions – potentially altering the security landscape across the entire region.³⁶

Ultimately, the outcome of the war in Ukraine will determine whether the European continent will return to an old security model defined by zero-sum logic and power politics. The shockwaves of Russia’s aggression are acutely felt in the South Caucasus, and their repercussions will shape regional dynamics for years to come. Should Moscow succeed in forcing Ukraine to accept Russian suzerainty, there is a real risk that the South Caucasus could once again fall under Kremlin domination.

Armenia

The Karabakh conflict has shaped the geopolitics of the South Caucasus for over three decades. After its victory in the first Karabakh war, Yerevan found itself excluded from key regional infrastructure projects and became heavily reliant on Moscow for security guarantees. This dependency was institutionalised through the deployment of Russian FSB Border Guards along Armenia’s frontiers and the extension of the Russian military presence at the Gyumri base. It also translated into Armenia’s participation in Moscow-led institutions, such as the Commonwealth of Independent States (CIS), the Collective Security Treaty Organisation (CSTO), and the Eurasian Economic Union (EAEU).

In parallel, a series of opaque agreements turned Russia into one of Armenia’s largest investors and principal trade partners, deepening its economic dependence. As a result, for decades, the Kremlin maintained a dominant influence over Yerevan’s defence and security posture, as well as its broader political, economic, and foreign policy choices.

Between 2020 and 2023, Azerbaijan launched two major offensives against Armenian forces in Karabakh, resulting in Baku gaining full control over the region and prompting the mass exodus of hundreds of thousands of ethnic Armenians. These events dramatically reshaped the geopolitical landscape of the South Caucasus and significantly altered the regional security balance. Notably, during these military operations, Russia – despite being Armenia's long-standing security guarantor – failed to provide any meaningful support to avert Yerevan's defeat.

The most recent phase of the Karabakh conflict marked a shift in Russia's posture towards the South Caucasus, revealing a noticeably less supportive stance towards Armenia and its pro-Western Prime Minister, Nikol Pashinyan. Moscow's unwillingness or incapacity to intervene on Yerevan's behalf signalled a broader recalibration of its regional policy.

Paradoxically, the conclusion of the Karabakh conflict opens new strategic opportunities for Armenia. Freed from the constraints of the unresolved territorial dispute, Yerevan is now better positioned to participate in regional infrastructure and connectivity initiatives. More importantly, it has a chance to loosen its dependence on Russia and pursue closer cooperation with the West, including renewed momentum for EU integration. During testimony before the US Senate on 30 July 2024, Assistant Secretary of State James O'Brien underlined Washington's support for Armenia's efforts to 'break with Russia' and its inclusion in Trans-Caspian projects.³⁷ The Trump administration has yet to signal its approach to the South Caucasus region.

Prime Minister Pashinyan has already taken a number of bold steps to distance Armenia from Moscow's orbit. These include freezing Armenia's participation in the CSTO, halting financial contributions to its budget, and publicly declaring his intention to withdraw from the bloc.³⁸ In a further move, Russian border guards were discharged from their posts at Zvartnots International Airport and the Armenia–Iran border crossing.³⁹

Pashinyan has also advanced Armenia's Western orientation by formally endorsing a draft law on EU accession, which has since been passed by the Armenian Parliament, and by signing the Charter on Strategic Partnership with the US.

Unsurprisingly, Yerevan's pro-Western pivot has provoked strong criticism from the Russian government. In March 2024, Foreign Minister Sergey Lavrov warned that Russia might 'reconsider' its relationship with Armenia should Yerevan continue to drift away from Moscow and align more closely with the West.⁴⁰

Nevertheless, Russian officials adopted a more measured tone regarding the US–Armenia Strategic Partnership Charter. Both Lavrov and Kremlin spokesperson Dmitry Peskov acknowledged Armenia's 'sovereign right' to choose its international partners.⁴¹ Lavrov, however, voiced sharper concerns about deepening EU–Armenia ties, arguing that Armenia's integration with the European Union was incompatible with its continued membership in the Eurasian Economic Union, given fundamental differences in trade duties and tariffs.⁴²

Despite this rhetorical restraint, Russia retains multiple levers to undermine Armenia's emerging pro-Western trajectory. It remains Armenia's largest trading partner and the source of roughly one-third of its foreign direct investment. Russian entities also control critical sectors of Armenian strategic infrastructure, including the national railway system, which is owned by Russia's state railway company. Russia also hosts the largest Armenian diaspora community, which is responsible for nearly two-thirds of Armenia's total remittance inflows.⁴³

Aside from its economic leverage, Moscow retains considerable strategic and political influence within Armenia. It operates the Gyumri military base under a lease agreement set to expire in 2044, and Russian border guards continue to control Armenia's frontier with Türkiye. Domestically, Prime Minister Pashinyan faces mounting pressure from tens of thousands of internally displaced persons (IDPs) and war veterans who hold him responsible for the loss of Karabakh – exposing him to significant political vulnerability.

In this context, the durability of Armenia's pro-Western shift will depend not only on sustained Western support, but also on Yerevan's ability to weather both internal dissent and external pressure from Moscow.

One important factor bolstering Yerevan's resilience to potential Russian military pressure is geography: the absence of a shared border with Russia deprives the Kremlin of a direct land route to Armenia, including its military base in Gyumri. However, this strategic buffer could vanish if Moscow succeeds in drawing Georgia back into its orbit. Under Kremlin pressure, it cannot be excluded that Tbilisi might be compelled to allow Russian overland access to Armenia – an outcome which would fundamentally alter Armenia's security calculus.

The Pashinyan government faces an uphill struggle in extricating Armenia from the Russian sphere of influence and steering it towards the West. Yet in recent years, Yerevan has made notable strides in this direction. Supporting Armenia on this path serves the interests of both the Euro-Atlantic community and the wider South Caucasus region. This imperative has grown more urgent in light of Georgia's recent pivot away from its long-standing trajectory of European and Euro-Atlantic integration.

Unless Georgia reaffirms its European aspirations, Armenia will remain the only South Caucasus country actively pursuing EU membership. This isolation significantly complicates Yerevan's Western integration efforts. For decades, Georgia provided Armenia – a landlocked state with fraught relations with Türkiye and Azerbaijan – with vital access to both Russia and the West. Tbilisi's shift towards Moscow risks enabling Russia to further isolate the Pashinyan government and regain leverage over regional and trans-regional infrastructure and connectivity projects.

The trajectory of the Karabakh conflict once again underscores that excessive reliance on Russia – and, in particular, on its security guarantees – can ultimately pose a threat to national security rather than reinforce it.

Azerbaijan

For Azerbaijan, the achievement of full control over Karabakh represents the most consequential event in its modern history. Baku's two-phased military success exposed Russia's clear unwillingness to fulfil its commitments to Armenia when they ran counter to the Kremlin's interests.

UN Security Council Resolutions 822, 853, 874, and 884 (adopted in 1993) called for the withdrawal of Armenian forces from territories outside the Soviet-era Nagorno-Karabakh Autonomous District. It is plausible that Baku engaged in extensive diplomatic coordination prior to the 2020 offensive, potentially securing Moscow's tacit approval for the seizure of these areas. Russia, meanwhile, retained leverage over Yerevan, which still relied on the Kremlin's backing to maintain control over the remaining Armenian-held parts of Karabakh.

In parallel, Russia secured a military foothold in Karabakh through the deployment of 2,000 peacekeepers to the Lachin Corridor – an arrangement that extended its presence in the South Caucasus. However, the mission came to an end following Azerbaijan's full reconquest of the region and the subsequent withdrawal of Russian forces in 2024.⁴⁴

Strikingly, just two days before launching its full-scale invasion of Ukraine, President Putin and President Aliyev signed the Declaration on Allied Interaction in Moscow on 22 February 2022. Among its provisions is a commitment that each party shall 'refrain from any actions that, in the opinion of one of the Parties, damage the strategic partnership and allied relations of the two states'.⁴⁵

There is no firm evidence indicating whether or not Baku informed Moscow in advance of its September 2023 military operation in Karabakh. However, given Russia's long-standing tactic of exploiting unresolved conflicts to exert leverage over neighbouring states, it is difficult to imagine that the Kremlin welcomed Azerbaijan's lightning offensive, which secured full control of the region in a single day. More likely, Russia – heavily preoccupied with its costly and protracted war against Ukraine – lacked both the capacity and the appetite to confront Azerbaijan and risk a wider confrontation involving Türkiye.

The Shusha Declaration on Allied Relations, signed by Azerbaijan and Türkiye in 2021, includes provisions for mutual military assistance in the event of external aggression.⁴⁶ This commitment likely served as a powerful deterrent, forestalling any possible Russian military response against Baku.

The Second Karabakh War resulted in Russia losing its major leverage over both Azerbaijan and Armenia, while Baku and Ankara significantly strengthened their standing in the region.

In the wake of EU sanctions imposed on Russia, Azerbaijan has significantly expanded its role as an energy supplier to Europe. The Memorandum of Understanding signed between the EU and Azerbaijan on 18 July 2022 envisages a Strategic Partnership in the Field of

Energy and includes a pledge to double the capacity of the Southern Gas Corridor, aiming to deliver at least 20 billion cubic meters of gas annually to European markets by 2027. Progress is already visible as Azerbaijan's gas exports to the EU have risen from 8.1 billion cubic meters in 2021 to 12.9 bcm in 2024.⁴⁷

Beyond natural gas, the agreement also extends to cooperation in the field of clean energy.⁴⁸ In December 2022, Azerbaijan, Georgia, Hungary, and Romania concluded a landmark agreement to construct a high-voltage submarine cable across the Black Sea. This project is intended to transmit renewable electricity – principally from Azerbaijan's planned offshore wind farms in the Caspian Sea and from Georgian sources – to Romania and Hungary,⁴⁹ thereby enhancing regional interconnectivity and supporting the EU's green transition.

Looking ahead, the development of a trans-Caspian energy corridor would further elevate Baku's strategic importance. It would not only deepen Azerbaijan's contribution to European energy security but also cement its role as a bridge between the EU and Central Asia.

Among the three South Caucasus states, Azerbaijan currently appears to be the most resilient to Russia's revanchist ambitions and hybrid tactics. A number of interrelated factors contribute to the robustness of Baku's position:

- The successful restoration of its territorial integrity following the Karabakh conflicts has enabled Azerbaijan to unlock its full geopolitical and economic potential, while simultaneously eliminating Moscow's most potent instruments of leverage.
- Azerbaijan's deepening strategic alliance with Türkiye – underpinned by intensive political, economic, and defence cooperation – acts as a powerful deterrent against potential Russian military pressure.
- Large hydrocarbon reserves, exported primarily to European markets, have fuelled sustained economic growth and elevated Azerbaijan's international profile. This energy-based diversification significantly reduces Baku's economic dependency on Russia.
- The consolidation of political power within Azerbaijan has limited the space for foreign-sponsored hybrid interference, including from Russian state-linked media and NGOs.
- Importantly, Baku's decision not to seek EU or NATO membership, alongside its continued participation in the Commonwealth of Independent States, has helped to avoid provoking direct confrontation with Moscow. From the Kremlin's vantage point, the expansion of NATO – and, to a lesser extent, the EU – poses a more immediate threat to its neo-imperial ambitions than Azerbaijan's close partnership with Ankara.

Taken together, these dynamics point to a marked strengthening of Azerbaijan's regional influence. The firm response by Baku to Russia's apparently accidental downing of an Azerbaijani passenger aircraft in December 2024 over Grozny further underscores its confidence and assertiveness in dealing with Moscow. Looking ahead, Azerbaijan is likely

to maintain its strategic alignment with Türkiye while preserving tactical flexibility in its relations with Russia.

Energy will remain a key vector of Baku's international posture. Barring dramatic regional upheaval, Azerbaijan's role in ensuring European energy security is expected to grow in the coming years. Meanwhile, relations with the new US administration are evolving: on 14 March 2025, President Trump's special representative, Steve Witkoff, made an unannounced visit to Baku – an indication that Washington may also be recalibrating its approach to Azerbaijan in light of shifting regional dynamics.⁵⁰

The Zangezur corridor

The proposed 43-kilometre transport route connecting mainland Azerbaijan to the Nakhchivan Autonomous Republic runs through Armenia's Syunik region. While Baku refers to it as the 'Zangezur corridor', invoking historical narratives of territorial continuity, Yerevan prefers the term 'Syunik corridor', underlining its concern over sovereignty and territorial integrity.

Despite the formal end of the Karabakh conflict, the issue of a transit corridor linking the western regions of Azerbaijan and the Nakhchivan Autonomous Republic via Armenia remains unresolved. This so-called Zangezur or Syunik corridor, envisaged as part of post-war regional connectivity, was addressed in paragraph 9 of the trilateral ceasefire statement signed by the Presidents of Azerbaijan and Russia, and the Prime Minister of Armenia on 10 November 2020.

The relevant clause stipulates: 'All economic and transport communications in the region will be unblocked. The Republic of Armenia guarantees the security of transport links between the western regions of the Republic of Azerbaijan and the Nakhchivan Autonomous Republic to facilitate the unhindered movement of citizens, vehicles, and cargo in both directions. Control over transport communications is conducted by the Border Service of the FSB of Russia.'⁵¹

While the language suggests a mutual commitment to reintegrate regional transport networks, implementation has so far stalled although the Washington declaration noted above may give it additional impetus.

The deadlock reflects the persistent distrust between Yerevan and Baku, as well as broader geopolitical sensitivities. Armenia views the corridor proposal as a potential infringement on its sovereignty, while Azerbaijan frames it as an essential part of the post-conflict regional settlement. Russia, formally designated as the overseer of the corridor, remains involved but appears increasingly sidelined amid its weakened standing in the region.

The corridor's unresolved status continues to cast a shadow over long-term normalisation between Armenia and Azerbaijan, and could yet emerge as a major point of contention in future negotiations.

The debate surrounding the corridor functions on two interconnected levels:

- Locally, it addresses Azerbaijan's strategic interest in ensuring direct, uninterrupted access to its exclave of Nakhchivan. Baku views this as critical for integrating the exclave into national economic and social life, easing the movement of people and goods, and bolstering national cohesion. Facilitating infrastructure links would allow Nakhchivan's population to benefit from improved market access, logistical supply lines, and internal mobility, thereby reducing its isolation.
- Regionally, the corridor would serve as a bridge between Türkiye and Azerbaijan, with broader implications for connectivity across the Caspian and into Central Asia. From Ankara's perspective, this link enhances its strategic reach into the Turkic world and deepens economic and political cooperation with Baku. In contrast, Tehran views the project with growing apprehension. Iranian officials fear it may diminish Iran's own transit relevance in East–West trade and, more broadly, shift the regional balance of influence away from Tehran.

The project's geopolitical resonance extends far beyond its physical scale. While framed by Azerbaijan and Türkiye as a pragmatic development initiative, its realisation would reshape the geopolitical architecture of the South Caucasus, adding a new layer of competition between regional powers and intensifying debate over sovereignty, security, and strategic alignment.

The operationalisation of the Zangezur/Syunik corridor is widely believed to hinge on the successful conclusion of a bilateral peace agreement between Armenia and Azerbaijan, alongside the broader normalisation of Armenian–Turkish relations. These developments would lay the legal and political groundwork for cross-border connectivity in a region long fractured by war and mistrust.

Iran's opposition to the corridor, as previously noted, remains resolute. Tehran fears that the corridor would undercut its regional transit relevance and embolden pan-Turkic linkages from Türkiye to Central Asia via Azerbaijan, bypassing Iranian territory entirely.

Russia's position is more ambivalent but no less strategic. Moscow initially supported the idea of the corridor as part of the 10 November 2020 ceasefire declaration – particularly the provision stipulating the deployment of Russian FSB border guards to oversee its security. This would allow Russia to entrench its presence in a post-war South Caucasus, reinforcing leverage over both Baku and Yerevan. However, the prospect of Armenia, Azerbaijan, and Türkiye jointly managing the corridor without Russian involvement would fundamentally alter this equation – diminishing Moscow's foothold and curtailing its influence.

A trilateral Armenian–Azerbaijani–Turkish rapprochement, grounded in peace and pragmatic economic cooperation, would run counter to Russia's traditional 'divide and rule'

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strategy in the region. Such a scenario would deprive the Kremlin of a key lever in the South Caucasus and could trigger a recalibration of power dynamics in Eurasia's borderlands.

As a result, it is plausible that Moscow will seek to delay, dilute, or derail a final peace accord between Armenia and Azerbaijan, fearing that it would pave the way for deeper Turkish influence and the erosion of Russia's residual dominance. The eventual replacement of FSB units by Armenian border guards would symbolise more than just a shift in corridor management – it would mark a broader transition away from Russian tutelage in the region's post-war order.

THE ZANGEZUR CORRIDOR

Proposed and existing railway links connecting Azerbaijan and Türkiye via the Nakhchivan Autonomous Republic

- Kars–Nakhchivan railway line project
- 158 km railway line between Ordubad and Velidag
- Planned 166 km railway line between Horadiz and Ordubad
- Existing railway line



Armenia–Türkiye relations

The relationship between Armenia and Türkiye remains deeply fraught, shaped by a complex history and diverging contemporary interests. Two core issues continue to define the impasse.

The first is the legacy of the mass atrocities committed against Armenians in the Ottoman Empire during World War I. Armenia, backed by a large and politically active diaspora,

continues to campaign for international recognition of these events as genocide. Over the past decades, this stance has gained significant traction globally, with formal recognition by the Council of Europe, the European Parliament, the Vatican, France's National Assembly, both chambers of the US Congress, and others. For Türkiye, however, the characterisation of these events as genocide remains highly contentious and is viewed as an affront to national identity and historical narrative. This ongoing discord constrains diplomatic engagement and inhibits reconciliation.

The second source of tension is Türkiye's unequivocal support for Azerbaijan, particularly during and after the Karabakh conflicts. Ankara's political, military, and economic backing of Baku – most visibly during the 2020 war – has heightened Armenian security anxieties and reinforced perceptions of regional isolation. The alignment between Ankara and Baku, formalised through agreements such as the 2021 Shusha Declaration, continues to complicate Armenian–Turkish dialogue.

Despite these persistent obstacles, there have been periodic efforts at normalisation, including the 2009 Zurich Protocols and more recent rounds of low-level diplomacy. However, tangible progress has remained elusive, in part due to the absence of trust and the entrenchment of zero-sum perceptions on both sides.

Both issues – genocide recognition and the deepening of Turkish–Azerbaijani strategic ties – have intensified over the past two decades. On one side, successive Armenian governments and the global Armenian diaspora have continued to push for wider international recognition of the 1915 mass killings as genocide. On the other, Türkiye under President Erdoğan has significantly strengthened its partnership with Azerbaijan, especially in the military domain, culminating in a formalised alliance through the Shusha Declaration in 2021.

The period since the aborted 2009 'football diplomacy' has seen relations stagnate or regress. However, the end of the Karabakh conflict in 2023 may offer a potential inflection point. For the first time, Armenia has formally acknowledged Azerbaijan's territorial integrity – albeit through government statements rather than constitutional amendments, as demanded by Baku.⁵² While this concession is politically and symbolically significant, its durability remains contingent on developments in the broader regional environment.

Nevertheless, the changed realities on the ground may create space for a tentative recalibration of Armenian–Turkish relations. Should Armenia and Azerbaijan succeed in formalising a comprehensive peace agreement, it could establish a framework for trilateral cooperation involving Türkiye. This, in turn, may open pathways for incremental confidence-building between Ankara and Yerevan – particularly in the economic and transport domains, where shared interests could override historical antagonism, at least in the short to medium term.

Türkiye's recent consolidation of influence in northern Syria has given Ankara renewed motivation to revisit previously stalled foreign policy goals, including the restoration of diplomatic ties with Armenia. Unlike the entrenched animosities seen elsewhere in the region, Turkish society at large does not appear to harbour deep-seated hostility or existential fears toward Armenians. This relatively neutral public sentiment could facilitate a political opening from Ankara – should the geopolitical circumstances align. Strikingly, Nikol Pashinyan, the Armenian Prime Minister made an official visit to Ankara in June 2025 – the first such visit to Türkiye by an Armenian leader since Armenia's independence in 1991. The visit was widely interpreted as an indication that both countries have an interest in normalising relations.

Two key conditions are likely to shape Türkiye's posture going forward. First, Ankara would expect a de-escalation in Yerevan's campaign for international recognition of the 1915 events as genocide – a matter that has long been a political red line for Türkiye. Second, any rapprochement would almost certainly require tacit or explicit approval from Baku, given the close strategic alignment between Türkiye and Azerbaijan.

In the wake of military defeat and perceived abandonment by Moscow, Prime Minister Pashinyan appears well-positioned to redefine Armenia's strategic orientation. His government may be uniquely capable of dismantling legacy constraints and pursuing a pragmatic reset. Yet this is unlikely to be a linear process. Deep domestic divisions, regional uncertainty, and the unresolved status of Armenian–Azerbaijani negotiations all complicate any attempt to build a new relationship with Ankara.

To begin with, any reset of relations between Yerevan and Ankara is contingent on the successful conclusion of a peace agreement between Armenia and Azerbaijan. Without a settlement, the political conditions for Turkish–Armenian rapprochement will remain elusive. Second, Prime Minister Pashinyan will likely need to secure a renewed electoral mandate in the 2026 elections before undertaking further steps towards reconciliation. 'Turkophobia' – a legacy deeply rooted in Armenia's historical narrative and national psyche – remains a significant societal undercurrent. This sentiment continues to constrain Armenia's political leaders and could impose a high political cost on Pashinyan if not carefully navigated.

Third, Armenia must come to terms with its fraught and deteriorating relationship with Moscow. For decades, the Kremlin has derived strategic benefit from the protracted Armenian–Azerbaijani conflict, using it to entrench its influence over Yerevan and preserve its role as regional arbiter. Any final resolution between Armenia and Azerbaijan – and, by extension, normalisation between Yerevan and Ankara – would dilute Russia's leverage in the South Caucasus and run counter to its long-standing interest in maintaining a fragmented regional order.

Although Türkiye and Russia are frequently described as strategic partners, their relationship is far more complex.⁵³ They are transactional collaborators in certain theatres, such as Syria

or energy diplomacy, but fundamentally remain strategic rivals. Their geopolitical interests collide across a wide arc – stretching from the South Caucasus and the Black Sea to the Balkans, Central Asia, and the Middle East. In this context, Moscow is unlikely to welcome any scenario that would see Türkiye consolidate its influence in the South Caucasus through improved ties with Armenia.

Pragmatic cooperation between Türkiye and Russia on selective issues does not obscure the underlying reality that both powers remain strategic competitors, each seeking to undermine the other's influence across shared geopolitical fault lines. Against this backdrop, the war in Ukraine and Georgia's pivot away from its Euro-Atlantic trajectory have created unexpected openings for Armenia. Ironically, Armenia's defeat in the Second Karabakh War has created conditions that could enable it to re-orient its foreign policy, reduce its dependency on Russia, and pursue rapprochement with the US, the EU, and potentially even Türkiye.

In this context, the absence of fundamental strategic conflicts between Ankara and Yerevan – beyond the historical grievance surrounding the Armenian genocide – suggests that the path to normalisation is not only conceivable, but politically viable, provided both sides adopt a pragmatic posture. Encouragingly, a series of gestures in recent years – such as the appointment of special envoys in 2021, the resumption of direct flights, and the humanitarian aid exchange following the 2023 Turkish earthquake – indicate that the groundwork for reconciliation is slowly being laid.⁵⁴

Ultimately, the successful conclusion of a peace treaty between Armenia and Azerbaijan, along with a calibrated shift in Yerevan's public engagement on the genocide issue, are likely to be decisive preconditions for any sustainable normalisation of Armenian–Turkish relations. While geopolitical headwinds remain, the post-Karabakh environment offers a rare opportunity to rewrite entrenched dynamics. Whether this opportunity will be seized depends not only on domestic political will in Yerevan and Ankara, but also on the broader regional balance of power and the continued engagement of Western partners.

The 3+3 format

In the aftermath of the 2020 ceasefire between Armenia and Azerbaijan, Turkish President Erdoğan floated the idea of a regional cooperation platform – the so-called 'Platform of Six' – encompassing Armenia, Azerbaijan, Georgia, Iran, Russia, and Türkiye. The initiative was later formalised into the '3+3 format', aimed at fostering dialogue and regional connectivity between the three South Caucasus states and the three major regional powers. The first meeting at the level of deputy foreign ministers took place on 10 December 2021 in Moscow.⁵⁵ However, the format has remained incomplete: Georgia has refused to participate due to its severed diplomatic ties with Russia following the 2008 war, as well as its broader Western-oriented foreign policy. As a result, all subsequent engagements have effectively proceeded as a 3+2 configuration. This asymmetry limits the platform's potential to act as a truly comprehensive regional framework, despite the rhetorical commitment by its

participants to promote peace and integration.

While the 3+3 format initially aligned well with Russia's geopolitical calculus, its utility in a reduced form has only increased in the wake of two transformative developments: the Kremlin's growing regional vulnerabilities stemming from the war in Ukraine, and Azerbaijan's decisive victory in the Second Karabakh War. For Moscow, the platform offers a relatively low-cost mechanism to reassert influence in the South Caucasus by leveraging the dynamics of multilateral diplomacy and the limited appetite of Western actors for sustained regional engagement.

The Kremlin appears intent on using the 3+3 structure not merely as a forum for dialogue, but as an instrument for shaping the evolving power configuration in the region. It seeks to institutionalise cooperation with Türkiye and Iran while subtly constraining the involvement of extra-regional actors – namely the US, the EU, and, increasingly, China. Türkiye and Iran also perceive the format as a vehicle to entrench their own regional roles, albeit driven by different motivations and strategic agendas.

Azerbaijan, emboldened by its military gains, views the 3+3 as a platform to consolidate its new position and expand its diplomatic leverage. For Armenia, the forum opens an auxiliary channel to engage with Ankara and Baku outside of bilateral or Western-led mediation frameworks. In contrast, Georgia's potential participation remains contested. While the ruling Georgian Dream party representatives did not entirely rule out the idea,⁵⁶ domestic political forces – particularly opposition parties, civil society actors, and Euro-Atlantic policy communities – have fiercely resisted it, viewing the initiative as a backdoor for Russian reintegration efforts. Indeed, every 3+3 meeting, including the most recent one held at the foreign ministerial level in Türkiye on 18 October 2024, is routinely followed by renewed calls for Georgia to join – calls that underscore both the strategic importance of Georgia and its persistent geopolitical ambivalence.

For Tbilisi, joining the 3+3 would carry symbolic and strategic costs, reinforcing the perception of a drift from the West while offering little concrete benefit in return. In this context, the format functions less as a bridge for pan-regional cooperation and more as a competitive arena for influence under evolving post-war conditions.

Georgia in limbo

Georgia remains the most vulnerable South Caucasus state to Russian pressure, as Moscow continues its illegal occupation and militarisation of the Abkhazia and Tskhinvali regions. Russia has established two military bases in these occupied areas, housing approximately 10,000 troops equipped with offensive capabilities. These deployments have been bolstered by naval and air assets, along with the presence of FSB border guards.

Russia's five-day war against Georgia in 2008 marked a shift in its revanchist foreign policy, which increasingly relies on force. This approach continued with the illegal annexation

of Crimea in 2014 and culminated in the full-scale invasion of Ukraine in 2022. The situation in Georgia's occupied territories severely undermines the country's sovereignty and territorial integrity, while also threatening the broader security and stability of the South Caucasus and the wider Black Sea region. The border with Russia, particularly one adjoining the occupied areas, heightens the risk of renewed aggression.

The full-scale invasion of Ukraine further exacerbated Georgia's security environment. Unlike Armenia and Azerbaijan, whose regional dynamics are more closely tied to the Karabakh conflict, Georgia's situation is more directly impacted by the war in Ukraine.

Since 2002, Russia has intensified the development of military and dual-use infrastructure in Georgia's occupied territories, including the construction of a permanent naval base in Ochamchire and the renovation of Sokhumi airport in occupied Abkhazia.⁵⁷

These developments pose additional risks to Georgian security and further challenge the Euro-Atlantic community. It also raises the risk of a spillover of the war into Georgia's territory. Ukraine's President Volodymyr Zelensky has explicitly warned that Russia's militarisation of occupied Abkhazia could provoke responsive measures, stating Ukraine would 'reach them anywhere'.⁵⁸

Meanwhile, Moscow's hybrid influence operations in Georgia are flourishing.

Since the outbreak of the war in Ukraine, Russian-style propaganda has taken root, amplified through nationwide media such as the Public Broadcaster and pro-government TV Imedi and echoed by the representatives of the ruling Georgian Dream party. Conforming to the Kremlin's narrative, former Prime Minister Irakli Gharibashvili blamed NATO's enlargement for Russia's invasion of Ukraine during the Global Security Forum in 2023.⁵⁹

Georgian Dream has also promoted the notion of a so-called 'Global War Party' – recently rebranded as the 'Deep State' – allegedly plotting to open a second front in Georgia and overthrow the government through collaboration with the 'radical' opposition. The ruling party now routinely labels virtually all major opposition parties as 'radicals' and lumps them together under the legacy of the United National Movement (UNM), Georgia's governing party from 2004 to 2012.

In the run up to the 2024 parliamentary elections, Georgian Dream intensified its crackdown on the opposition. Bidzina Ivanishvili – the Party's leader and the honorary chairman, blamed former President Mikheil Saakashvili and the UNM for starting the 2008 war, claiming that he acted on foreign orders and that Georgia should 'apologise' to Ossetians. This narrative contradicts both international findings and human rights reports: Human Rights Watch (HRW) found no evidence of intentional attacks on civilians by Georgian forces,⁶⁰ while the International Criminal Court (ICC) issued arrest warrants for war crimes committed against ethnic Georgians during Russia's invasion.⁶¹

In January 2025, Georgian Dream established a parliamentary commission to investigate alleged crimes during the UNM's tenure.⁶² The commission's expanded powers allowed it

to summon opposition figures such as Giorgi Gakharia, a former prime minister and interior minister under Georgian Dream until his resignation in February 2021.⁶³ The commission is widely seen as a political tool to discredit the opposition and to reinforce the narrative that Georgia provoked the 2008 war. In fact, blaming Georgia's former government for the war repeats Moscow's narrative, which the latter uses to justify its invasion and occupation of Georgia's territories and the illegal ethnic cleansing that followed. It also may have a negative impact on Tbilisi's policy of non-recognition of the occupied territories. Russia's influence also extends through a network of affiliated media outlets, NGOs, and public organisations. An investigation by the watchdog group iFact revealed 76 pro-Kremlin organisations operating in Georgia in December 2022.

Despite Russia's growing sway, formal diplomatic channels have not been restored. The informal dialogue mechanism launched in 2012 between Russian deputy foreign minister Grigory Karasin and the Georgian prime minister's special envoy, Zurab Abashidze, has stagnated. Karasin, now a Senator and Chair of the Federation Council Committee on Foreign Affairs, has publicly dismissed the restoration of Georgia's territorial integrity, further undermining its utility.⁶⁴

The war in Ukraine has also triggered large-scale Russian emigration to Georgia. Starting in March 2022, tens of thousands of Russians entered the country in response to the full-scale invasion of Ukraine, many without any vetting or visa restrictions. After the Kremlin's partial mobilisation in September 2022, Russian migration surged again. According to official data, 62,304 Russian citizens were residing in Georgia in 2022, up from 10,881 in 2021.⁶⁵ Though numbers declined slightly in 2023 to 52,627, their presence remains significant. Armenia saw similar trends, with about 55,000 Russians arriving in 2022.⁶⁶

This influx presents potential risks. Hosting a large population from an occupying power without adequate background checks is a major vulnerability – particularly when Moscow has formalised its intent to 'protect' Russian speakers abroad.⁶⁷ President Putin's 2022 approval of the 'Humanitarian Policy of the Russian Federation Abroad' aims to 'protect the rights of the Russian-speaking populations of Latvia, Lithuania, Estonia, Georgia, and Moldova'.⁶⁸ Ukraine provides a stark example of how Moscow 'defends' the rights of its citizens abroad.

The EU's 2030 enlargement horizon and Georgia's candidacy status, granted in December 2023, represented a breakthrough. Yet after the initial success, Georgia has failed to seize this historic opportunity. In fact, the policies of the ruling party have distanced the country from Europe, as confirmed by the EU,⁶⁹ while Prime Minister Kobakhidze has called on the EU to 'be more flexible' in accepting new members.⁷⁰

It should be noted that before receiving the EU candidate status, the ruling party attempted to impeach President Salome Zourabichvili, who travelled to Europe to advocate for Georgia's EU integration. The Georgian Dream party claimed that the President was not supposed to travel without receiving permission from the Parliament.

In early 2024, Georgian Dream passed a Russian-style ‘Law on Transparency of Foreign Influence’, triggering mass protests and widespread condemnation from Western governments. This led to the freezing of Georgia’s EU membership process and the suspension of the strategic partnership with the US.⁷¹ In July 2024, the Pentagon cancelled the joint ‘Noble Partner’ military exercise, citing unfounded government accusations of Western coup plots and efforts to open a second front in Ukraine.⁷²

The October 2024 parliamentary elections were widely deemed fraudulent by the OSCE, the European Parliament, and domestic observers. The European Parliament resolution of 28 November 2024 declared the elections illegitimate and called for new ones.⁷³ Opposition parties that passed the five per cent threshold refused to recognise the new parliament or its president.

In response, Georgian Dream formally suspended the country’s EU integration process until 2028. This *de facto* withdrawal sparked further protests, met with mass repression, arbitrary arrests, and draconian amendments to limit demonstrations⁷⁴ and media freedom.⁷⁵ In January 2025, the government also withdrew from the Parliamentary Assembly of the Council of Europe (PACE), citing a lack of fairness from European institutions.⁷⁶

At the same time, Georgian Dream has flirted with the possibility of joining the Kremlin-favoured 3+3 format at some point in the future. Lavrov reiterated his invitation to Georgia in January 2025. Should Tbilisi join, it would mark a strategic U-turn – abandoning decades of Euro-Atlantic aspiration for a regional format dominated by autocratic powers.

The emphasis of the 3+3 format on developing regional transport corridors raises concerns that Georgia could come under pressure to reopen the Abkhazian railway. This would run counter to Georgia’s national interests. This railway line, connecting Moscow to Tehran along the Black Sea coast via Abkhazia, has been closed since 1992.

Currently, Georgia has a government which has been weakening Georgia’s EU membership aspirations and deepening the country’s isolation from its Western allies, while winning approval from Russian officials.⁷⁷ In parallel, over the years, Moscow has been increasing bilateral economic cooperation with Tbilisi, including by restoring direct flights and becoming Georgia’s second largest trading partner. This has led to the emergence of a Moscow-oriented business elite in Georgia. The country now stands at a critical juncture in its modern history as a struggle for Georgia’s strategic orientation plays out. At the same time as the ruling party is strengthening its control of state institutions, suspending European integration and moving Georgia closer to Russia, a resilient civil society continues to resist, staging mass protests in defence of freedom, democracy, and the country’s European future, despite the government’s heavy-handed response to demonstrations.

In this deteriorating context, neither the new parliament nor the new president has been fully recognised by Georgia’s key international partners. In a symbolic break from tradition, foreign diplomats declined to attend the opening session of the new parliament in November

2024, and the newly elected president did not receive official congratulations from the US and most EU leaders. Meanwhile, Ivanishvili, along with other senior figures in Georgian Dream circles, has been sanctioned by the US and several European governments.

It remains unclear how long Western countries can sustain this quasi-formal relationship with the ruling Georgian Dream party. Although the US and some European ambassadors have resumed contact with Georgian officials, recent developments – including public threats by senior Georgian Dream figures to ban major opposition parties, the prosecution of opposition leaders for non-cooperation with a parliamentary commission, and legislation curbing independent media and civil society – make it increasingly unlikely that relations will return to business as usual.

The opposition and protest movement see the holding of new parliamentary elections – conducted in a genuinely free and fair environment – as the only viable path out of Georgia's acute political crisis.⁷⁸ This proposal is strongly supported by Georgia's European and American partners.⁷⁹ The alternative risks a serious deterioration of the political landscape, which could push the country towards pro-Russian autocracy or even civil unrest. Either outcome would have far-reaching consequences not only for Georgia but for the stability of the entire South Caucasus and wider Black Sea region. Georgia's shift into Russia's orbit would also strengthen the Kremlin's hand in undermining the Pashinyan government in Armenia and increase Moscow's leverage over emerging regional transport and energy corridors.

The consolidation of Russian influence in Georgia would represent a significant geopolitical setback for the West. In 2008, the West failed to grasp the long-term implications of Russia's invasion of Georgia, choosing instead to revert to business as usual with Moscow within months. That miscalculation emboldened the Kremlin to pursue its revisionist agenda with greater intensity, culminating in the illegal annexation of Crimea in 2014 and, ultimately, the full-scale invasion of Ukraine in 2022. By contrast, Georgia's return to the path of democratic governance and European integration would not only stabilise the country but also reinforce security across the South Caucasus. It would serve as an important building block for a resilient and inclusive European security architecture.

Conclusion

The South Caucasus is undergoing its most profound geopolitical transformation in decades, with major global and regional actors – including the US, the EU, China, Russia, Türkiye, and Iran – all pursuing strategic interests in the region. The outcome of the war in Ukraine will play a decisive role in shaping future international security arrangements, including those affecting the South Caucasus.

Given that the South Caucasus is embedded in the broader European space, its long-term security prospects are closely tied to the processes of EU and NATO enlargement. Despite the political challenges facing Georgia and Armenia, the strong pro-European aspirations of their populations remain undiminished. For both societies, EU membership is seen not merely as a policy goal but as a civilisational choice – a pathway to prosperity, stability, and democratic consolidation. Georgia's advancement along the Euro-Atlantic track has the potential to inspire deeper engagement from other regional states, reinforcing a broader realignment towards the West.

In this context, it is imperative that Western partners support Armenia both practically and politically in resisting Russian influence – particularly its hybrid tactics – while also fostering sustained dialogue and cooperation with Azerbaijan. A comprehensive peace agreement between Armenia and Azerbaijan would unlock the potential for lasting regional stability and deeper cooperation across the South Caucasus.

Meanwhile, the European Union has intensified its sectoral engagement with Azerbaijan, particularly in energy and transport. Looking ahead, in the event of continued progress on EU integration by Tbilisi and Yerevan, EU–Azerbaijan relations could evolve along the lines of the EU–Norway model: close cooperation without full membership. In addition, if US engagement in Europe's security continues to wane, Türkiye's potential reinvigoration of its EU accession bid could offer Baku a powerful incentive to deepen ties with Brussels.⁸⁰

By contrast, Georgia's democratic backsliding, the suspension of its EU integration process, and growing estrangement from Western partners – coupled with the continued occupation of its territories – have increased its vulnerability to Russian pressure. In this environment, Georgia's ruling party appears increasingly aligned with Moscow's interests, enabling the Kremlin to attempt a partial restoration of its influence in the South Caucasus, which has eroded in the wake of the Ukraine war and shifting regional dynamics following the Karabakh conflict.

Nevertheless, a key factor weakening Russia's regional standing has been the expanding influence of the EU and the US. The granting of EU candidate status to Georgia in 2023 marked a pivotal moment, signalling a formal commitment to European integration – though the undermining of democratic standards by the current Georgian authorities is

increasingly damaging this trajectory. Meanwhile, Armenia is actively distancing itself from Moscow and moving closer to Europe and the US.

Georgia's candidacy has already had a positive ripple effect, notably encouraging Armenia to pursue its own European path. If Tbilisi advances further on EU accession, it will likely accelerate Yerevan's integration efforts. In parallel, Georgia's progress could incentivise Baku to strengthen ties with the West – particularly by deepening its role in European energy diversification and by advancing trans-Caspian transport and energy corridors.

A coordinated transatlantic strategy – anchored in alignment between Brussels and Washington – could play a decisive role in shaping the region's future. While it remains unclear how proactive the current US administration will be, its sustained engagement in the region would provide significant geopolitical advantage to Washington and its allies.

Integrating the South Caucasus into the European political, economic, and security architecture would significantly strengthen the EU's southern and southeastern flanks, including the Black Sea and Mediterranean regions. It would also provide direct access to Central Asia's resources and markets, enhancing energy diversification and connectivity across Eurasia.

Within this paradigm, Europe can extend its values, standards, and institutional models beyond current EU borders, transforming the South Caucasus into a zone of stability and integration. This would yield broad strategic benefits for the EU and its partners.

The South Caucasus must not be sidelined in any broader settlement shaping Europe's future. In this context, it is essential that the outcome of negotiations to end the war in Ukraine, apart from ensuring Ukraine's sovereignty and its EU membership course, establishes the South Caucasus as an inseparable part of the European space rather than Russia's backyard.

NEST Centre commentary

The NEST Centre commissioned this paper from Georgian specialists to help refine our thinking about the fast-evolving dynamics in the region and their consequences for Russia. Seeing the issue from another angle is invariably a useful way to understand it better.

The paper offers a valuable national perspective rooted in a firm commitment to Georgia's democratic identity and European trajectory. Understandably, Russia's increasing turn to authoritarianism and violence against neighbours, including Georgia, over the past 20 years, has strengthened the conviction in much of Georgian society that Russia in its present form poses a long-term threat to the country's independence and security.

While we share many of the authors' concerns, our reading of the region's evolving dynamics leads us to a somewhat different set of conclusions. For the consideration of our readers, we offer the following additional thoughts:

- **While Russia's influence in the region has weakened, so has the West's.** Anchoring the South Caucasus in a Euro-Atlantic security architecture no longer appears feasible in view of the reduced importance of NATO for the US and the limited capacity of Europe to project military power. It is difficult to see how this situation might change in the short- to medium-term.
- **The EU will be preoccupied by Ukraine for many years even if the war ends soon.** Supporting Ukraine's reconstruction and recovery will be a strategic priority, placing significant demands on the Union's resources and limiting its ability to act further afield.
- With Russia distracted by Ukraine and likely to remain so for as long as Putin remains in the Kremlin, **Moscow's absence from the South Caucasus as an active player means that other powers will seek to fill the vacuum.** As the paper describes, this process has already started. Türkiye has quickly emerged as the dominant external actor and has done so up to now without damaging its relations with Moscow. However, its influence is being challenged by others. China, Europe, Iran, and Israel are also pursuing their interests in the region. Just as the Central Asian states seek multipolarity in their foreign policies, the leaderships of Armenia, Azerbaijan, and Georgia are likely to manoeuvre between the different poles of influence, playing one off against the other, to find what balance they can.
- **As it seeks to re-orientate itself towards the EU and the US, Armenia is vulnerable.** It does not have the same level of societal consensus on alignment with Europe as Georgia. If the EU cannot provide the support that it seeks, and a peace settlement with Azerbaijan proves harder to achieve than hoped, Yerevan could adjust its policy towards Russia and slow down its efforts to build balancing relations with its western partners.

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- **Russia's loss of influence will be relative in the sense that it will be contested rather than uncontested as it was during the Soviet period.** Its presence will continue to be felt even if Moscow's political, economic and military resources will be stretched by commitments in other areas. Of the three South Caucasus countries, Georgia will be under the greatest pressure to find a *modus vivendi* with Russia. Some facts are unalterable. Not only do the two countries share a border, Russian forces are also deployed in Abkhazia and South Ossetia. At the same time, the eastern seaboard of the Black Sea is taking on increased strategic importance for Moscow since the Russian Black Sea Fleet has effectively abandoned Sevastopol as its main base.
 - **Of the three countries, Azerbaijan appears to have the best possibilities for insulating itself from Russian influence.** The combination of its foothold on the Caspian, its oil and gas production and its close relations with Türkiye make it a strategically important player that can interact with greater confidence with China, Europe, and the US than Armenia and Georgia can. It is well placed to become Türkiye's proxy in the region.
 - **The South Caucasus is not just a geopolitical fault line; it is also a critical transit space.** Infrastructure, energy, and connectivity are increasingly central to how influence is being exerted in the region. The EU's efforts to diversify away from Russian energy have elevated Azerbaijan's role as a gas supplier, deepening Baku's ties to Brussels. At the same time, the Middle Corridor – the trans-Caspian route linking China to Europe that circumvents Russia – is being quietly strengthened, with Azerbaijan and Georgia positioned as key nodes. Türkiye's interest in a secure energy transportation corridor to deliver supplies from Central Asia is helping to drive this process.
 - It is hard at present to imagine Russia under different leadership with a different set of goals. However, **at some point, a Russian government will return to internal reform and, probably as part of this process, seek to restore relations with Europe.** If successful, it is possible that such a rapprochement will allow Russia to restore a degree of influence in the South Caucasus and beyond. However, this task will not be easy because the competition by then will be stronger. Moscow will find itself on a more crowded field facing other players who are better established than they are today.

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