

ARMENIA'S GEOPOLITICAL PIVOT: THE SOUTH CAUCASUS BALANCE SHIFTS

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Table of Contents

Abstract	2
1.The Breakdown of the Russian Security Umbrella	2
2.The Strategic Shift Toward the West and Regional Integration.....	3
3.The Russian Pushback: Destabilization and Hybrid Warfare	4
Conclusion: The High-Stakes Gamble and the Need for Western Delivery	5
Bibliography.....	7

Abstract

Armenia is currently navigating one of the most consequential foreign policy shifts in its modern history, moving decisively out of Russia's orbit and toward closer integration with the West. This pivot, driven by Russia's failure to act as a security guarantor during the Nagorno-Karabakh conflicts and accelerated by the potential historic peace deal with Azerbaijan, is simultaneously creating new economic opportunities and generating fierce destabilization efforts from Moscow.

1.The Breakdown of the Russian Security Umbrella

Armenia's current strategic reorientation is not a sudden, voluntary choice, but rather a profound, existential reaction to a collapse of trust between Yerevan and Moscow. This deterioration reached a critical point following the 2020 and 2023 conflicts with Azerbaijan, irrevocably shattering the long-held paradigm that placed Russia as the indispensable security guarantor in the South Caucasus. For decades, Armenia's entire defense doctrine and geopolitical identity were tethered to the Russian military presence - anchored by the substantial military base in Gyumri, initially contracted to remain until 2044, and membership in the Moscow-led Collective Security Treaty Organization (CSTO).



However, during the crucial phases of the conflict over Nagorno-Karabakh, this reliance proved catastrophic. The Armenian government and, more importantly, the public, perceived a fundamental failure of intervention from Moscow.

The widespread belief that Russia prioritized its complex relationship with Azerbaijan and Turkey over its formal treaty obligations to Armenia created a chasm of cynicism that even the most fervent pro-Russian elements could not bridge. This forced

Yerevan to confront a brutal truth of realpolitik: Russia was either unwilling or unable

to protect Armenia's core security interests, transforming Moscow from a reliable patron into a geopolitical liability. This erosion of faith has quickly translated into concrete policy steps aimed at systematic disengagement from Russian military and political structures.

In a highly visible demonstration of this pivot, Armenia announced in 2024 that it was freezing its participation in, and financial contributions to, the CSTO - a clear signal that it no longer considers the bloc viable for its defense needs. Furthermore, Yerevan ratified the Rome Statute of the International Criminal Court (ICC) in late 2023. This move, which obligates Armenia to cooperate with the Hague-based court, including potentially on the matter of the arrest warrant for President Vladimir Putin, was seen by the Kremlin as an overtly hostile act. Finally, Armenia has definitively embraced the deployment of the European Union-led civilian border monitoring mission (EUMA)

while simultaneously rejecting Russia's proposal for a similar monitoring force. Taken together, these actions reflect a deep-seated determination to dismantle the military and political architecture that long bound Yerevan to the Kremlin, clearing the ground for a new, independent foreign policy based on Western partnerships.

2.The Strategic Shift Toward the West and Regional Integration

With the Russian security guarantee decisively invalidated, Yerevan has embarked on a rigorous and multidimensional program of strategic diversification, decoupling its political, military, and economic future from Moscow's control. This process is characterized by an eager embrace of opportunities for regional peace and a rapid deepening of institutional ties with European and global partners, a shift that had been suppressed for decades by the unresolved Nagorno-Karabakh conflict and Russia's overwhelming regional dominance.

Armenia's political commitment to a new Western trajectory is evident in the accelerating pace of its relationship with the European Union. Building upon the foundation laid by the 2017 Comprehensive and Enhanced Partnership Agreement (CEPA), the conversation has shifted fundamentally from basic cooperation to the long-term, transformative goal of EU integration.



The European Parliament has been receptive, openly welcoming the prospect of Armenia seeking candidate status for the EU, a development that signals a dramatic geopolitical realignment. This political rapprochement is underpinned by substantial economic support, including the EU's pledge of a significant financial Resilience and Growth Plan, designed to help stabilize Armenia's economy and governance structures during this transition phase. Furthermore, the commencement of

visa liberalization talks in late 2024 is a clear, tangible benefit aimed at bolstering citizen support for the European path.

modernization and the creation of a truly sovereign defense capability. Yerevan has successfully secured significant defense contracts with France and India, signaling its intent to rapidly acquire modern, non-Russian weaponry and military technology. This expansion of cooperation with countries like Germany and others within NATO's orbit serves a twin purpose: it upgrades the Armenian military while further limiting Moscow's leverage over Armenian command and control systems.

Perhaps the most significant element of this strategic shift is the commitment to regional peace and the opening of new transport routes with Azerbaijan. The American-mediated agreement hinges on the full functioning of new transport links through Southern Armenia's Syunik Province

- a route often referred to as the Zangezur Corridor, but now some have framed as the Trump Route for International Peace and Prosperity (TRIPP). This corridor is more than just a road or rail link, it represents a profound geopolitical rebalancing. By providing a direct, uninterrupted path between Azerbaijan and Turkey, it effectively creates a major East-West transport artery that bypasses both Russia and Iran. Crucially, the United States has positioned itself as the strategic



involvement is also part of the problem.

oversight, securing exclusive rights for an international consortium to develop and manage the corridor for decades. This establishes a deep and guaranteed US strategic foothold in a vital Eurasian crossroads, ensuring that the economic dividends serve the interests of the West and regional stability, rather than being exploited by the historically dominant Russian and Iranian influences. However, the U.S.

China, Iran, and Russia do not welcome any form of U.S. engagement. Therefore, they will do everything possible to ensure that the Zangezur Corridor does not become operational with U.S. participation - and if it does, they will avoid using it or use it only minimally. Simultaneously, Armenia is strategically weaning its defense apparatus away from its historic reliance on Russian equipment and doctrine. This diversification is seen as critical for military

3.The Russian Pushback: Destabilization and Hybrid Warfare

Russia views Armenia's accelerating pivot toward the West and the deep Western involvement in the Zangezur corridor as an overt strategic betrayal and a significant loss of influence in the South Caucasus. Consequently, Moscow has activated a multi-layered campaign of hybrid destabilization, leveraging its deep intelligence and economic networks within Armenian society to undermine the Pashinyan government and derail the country's European trajectory.

The most overt and serious manifestation of this pushback has been the ongoing domestic political turmoil. The investigation into the 2024 and 2025 alleged coup attempts is widely interpreted as a direct Russian-backed effort to restore a pro-Kremlin regime. The diverse profile of those implicated - ranging from the "Karabakh Clan" (figures like former presidents Kocharyan and Sargsyan, whose interests are ideologically and personally tied to the old Russian patronage



system) to high-ranking clergymen (Archbishops Bagrat Galstanyan and Mikael Ajapahyan, who used their religious authority to mobilize street protests) and powerful oligarchs with direct ties to Vladimir Putin (such as Samvel Karapetyan) - reveals a comprehensive, coordinated attempt to use every available internal lever of power. These actors collectively represent the old guard who

benefited immensely from the pre-Pashinyan status quo and are now marshaled to resist the geopolitical shift.

Beyond direct political subversion, Russia relies on a sustained campaign of "traceless manipulation" designed to fracture Armenian society and sap its resolve for reform. Moscow utilizes sophisticated disinformation campaigns aimed at delegitimizing the pro-Western government, often weaponizing public anxiety over the peace process with Azerbaijan. The Kremlin aims to foster social polarization, not necessarily to win an election, but to prevent a stable, cohesive political environment that could successfully complete the European integration process. Russia seeks to portray the West as a fickle partner and Pashinyan as a national traitor who surrendered Karabakh and is now selling out the country's sovereignty.

The retention of the Russian military base in Gyumri and the country's economic dependency remain Moscow's primary means of overt coercion. While Armenia's political will to request the base's withdrawal is growing, Russia will not relinquish this key strategic asset easily. Furthermore, the reliance of Armenia's economy on trade with Russia - which paradoxically has grown to record levels in recent years - provides Moscow with significant economic leverage that can be deployed instantly through trade restrictions, energy price manipulation, or sanctions on key oligarchs if the political pivot accelerates too quickly. The destabilization campaign, therefore, is not a short-term reaction; it is a long-term strategy of attrition designed to ensure that Armenia remains permanently volatile, fragmented, and incapable of fully realizing its Euro-Atlantic ambitions.

Conclusion: The High-Stakes Gamble and the Need for Western Delivery

Armenia's geopolitical pivot represents a daring, high-stakes gamble driven by necessity rather than sheer ideological preference. As the Russian security umbrella collapsed and Moscow began actively working to destabilize Yerevan, Prime Minister Nikol Pashinyan had no viable alternative but to seek a definitive, long-term alignment with the Euro-Atlantic community.

The success of this entire transition, however, is deeply conditional. If the government's strenuous foreign policy efforts - the painful decoupling from Russia and the difficult normalization process with Azerbaijan - fail to yield tangible benefits, the momentum behind the European course could easily dissipate. Should the West's engagement prove slow, bureaucratic, or insufficient to generate measurable improvements in both the economic vitality and security posture of Armenia, the domestic political cost to Pashinyan could become unsustainable.

In such a scenario, where the promise of the West remains unfulfilled and the military risk persists, Pashinyan himself or a subsequent leader could be pragmatically forced to readjust the course toward Russia, seeking temporary reprieve from Moscow's destabilization efforts or attempting to strike a new, albeit humiliating, security bargain. This potential backsliding makes the current period critical.



Therefore, the responsibility now rests heavily on the shoulders of Armenia's external partners. For the pivot to be irreversible, the West must ensure rapid delivery: financial mechanisms must be unlocked swiftly, military diversification contracts must be honored efficiently, and, crucially, the US-mediated peace process with Azerbaijan must be brought to a final, successful conclusion. The full establishment of recognized borders and

the guaranteed functioning of the Zangezur corridor are essential not only for regional stability but also for providing the economic dynamism needed to validate Pashinyan's vision to the Armenian electorate.

The next few years will serve as the ultimate test of Armenia's sovereign will and the West's commitment. If the pivot delivers prosperity and peace, Armenia solidifies its place in the European family. If it fails, the Armenia risks relapsing into the volatile, contested status of a Russian client state, further destabilizing the entire region.

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