

GLOBAL DOMINO

THE SOUTH CAUCASUS IN THE CHAIN OF CONTEMPORARY CRISES



OPPORTUNITY
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The experts present their own independent opinions.

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A version of the report adapted for mobile screens and devices.

Executive Summary

This report examines the South Caucasus as one of the key junctions in the chain of contemporary crises: Russia's war against Ukraine, instability in the Middle East, competition over transport corridors, and the transformation of European security. Its central argument is clear: Armenia, Azerbaijan, and Georgia can no longer be treated as a peripheral post-Soviet space, but must be understood as part of a wider security system connecting the Middle East, the Black Sea, and NATO's Eastern Flank.

The region is being shaped by the weakening of Russia's position, the growing roles of Türkiye and Iran, the more active engagement of the United States, and the European Union's search for alternative energy sources and transport routes. As a result, the South Caucasus is becoming both a space of opportunity – for regional stabilization, trade, energy, and connectivity – and a zone of significant risk, where local tensions may quickly acquire broader strategic consequences.

The report argues that Poland, the European Union, and NATO should move beyond reactive crisis management and develop a more coherent strategy toward the region. This requires support for Armenia–Azerbaijan normalization, stronger resilience of critical infrastructure, closer monitoring of escalation risks around transport corridors, and the recognition that the South Caucasus is not a distant regional issue, but an integral element of European security.



Mount Ararat as viewed from Yerevan, Armenia



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Foreword

Żuzanna Nowak

The Opportunity Institute for Foreign Affairs

How far can instability travel?

The South Caucasus has become one of the places where this question can no longer be avoided. Its significance today lies in the density of consequences that intersect there. Decisions taken in Moscow, Ankara, Tehran, Brussels and Washington are refracted through a region whose internal order remains fragile, but whose external importance has seldom been greater. The war against Ukraine, the reordering of power in the Middle East and the search for durable routes between Europe and Asia have made the South Caucasus a place where policy assumptions are tested with unusual speed.

This report is written in that spirit. It does not seek to impose a single reading on a region that resists simplification. Its value lies in the quality of judgment brought by its authors: people who understand that maps alone explain little, and that infrastructure, military power, historical memory and political agency must be read together. The result is a volume that treats the South Caucasus with the seriousness too often reserved only for crises after they have already escalated.

The central problem examined here is the movement of consequences across regions. A crisis in the Middle East, a weakening of Russian leverage, a contested corridor, or a fragile peace process may each appear manageable when viewed separately. In practice, they form the strategic environment in which Europe, NATO and Poland will have to make decisions. The South Caucasus is therefore not merely an object of analysis. It is a warning about the cost of late attention.

I would like to thank all the authors for the discipline, expertise and intellectual generosity they brought to this publication. My particular thanks go to Marcin Popławski, the author of the report, whose command of the subject and careful structuring of the argument gave this volume its coherence. I am also grateful to the participants of the expert seminar organized by The Opportunity – Institute for Foreign Affairs in cooperation with the European Council on Foreign Relations, from which this work developed.

The following pages offer a serious guide to a region whose importance will only grow. They should be read by anyone concerned with the future of European security, the credibility of Western policy, and the ability of states to understand instability before it reaches their own borders.



Introduction

This report was prepared in connection with the closed expert seminar entitled ‘The Domino Effect: How the Transformation of the Middle East Is Reshaping Security in the South Caucasus and NATO’s Eastern Flank?’, held in Warsaw on March 25. The meeting was organized by The Opportunity Institute for Foreign Affairs in cooperation with the European Council on Foreign Relations. The conference brought together analysts and practitioners from Poland, EU countries, and the South Caucasus. The discussion focused on the ‘domino effect’ mechanism, namely the way in which conflicts and tensions originating in the Middle East spill over into the South Caucasus and subsequently affect the security of NATO’s eastern flank.

The aim of the seminar was to develop conclusions and policy recommendations for decision-makers in Poland, the European Union, and NATO concerning the stabilization of the South Caucasus region and the strengthening of resilience to geopolitical, energy, and transport-related pressures in a rapidly changing security environment.

Panel discussions indicated that the South Caucasus and the Middle East are increasingly operating within a single security system, in which destabilization in one area rapidly generates repercussions in other parts of the Euro-Atlantic space. Conference participants emphasized that contemporary crises are multidimensional and overlapping, creating an environment of persistent strategic uncertainty. In this context, the key challenge for European states is not only to respond to threats,

but above all to build systemic resilience and the capacity to manage the risk of escalation.

The first panel, ‘New Middle East, New South Caucasus: The Domino Effect in the Midst of the US–Israel–Iran War’, focused on shifts in the balance of power in the Middle East and their direct impact on security in the South Caucasus. It was pointed out that the region is no longer perceived as a peripheral post-Soviet space, but is increasingly becoming part of a broader security system encompassing the Middle East and the Euro-Atlantic area.



Arleigh Burke-class guided-missile destroyer USS Bainbridge transits the Suez Canal during Operation Epic Fury

It was emphasized that the weakening of traditional guarantors of stability, in particular the Russian Federation, has led to the emergence of a security vacuum, which increases the risk of conflict escalation and rivalry between regional and global actors. At the same time, the increased activity of countries such as Turkey and Iran is leading to a redefinition of the balance of power in the region. Participants noted that changes in political leadership within individual states are not the decisive factor for the region's stability. Of key importance are the strategic interests of states and the ability to maintain a balance between them.

The third panel, 'From the Middle East to NATO's Eastern Flank: Implications for the Security of Europe and Poland', focused on the consequences of the destabilization of the Middle East and the South Caucasus for European security, and on NATO's role in responding to new threats. It was emphasized that contemporary conflicts are systemic in nature and encompass both military actions and hybrid threats, including sabotage of critical infrastructure, cyberattacks and migratory pressure. Experts pointed out that transport and energy infrastructure is becoming one of the key elements

of strategic security. Disruptions to logistics routes or energy supplies can have direct economic and political consequences for European countries. In this context, the diversification of energy sources, the development of alternative transport routes and the building of resilience in infrastructure systems take on particular significance. The growing role of the countries on NATO's eastern flank, including Poland, as key elements of stability in the region was also emphasized.

The conference demonstrated that Europe's security is increasingly dependent on events taking place beyond its borders. The Middle East, the South Caucasus and Europe now form a single security system, in which local conflicts can quickly escalate into regional or global crises.

In the coming years, the key task for European states will be to strengthen strategic resilience and develop mechanisms for international cooperation. The stability of the region will depend not only on the ability to respond to crises, but above all on the ability to anticipate them and mitigate their effects.



The period of work on this report coincided with the ongoing war between the United States, Israel, and Iran; the growing role of Turkey in the South Caucasus; shifts in U.S. engagement in the region; and the further weakening of Russia's position as the traditional guarantor of regional order; and parliamentary elections in Armenia, which are significant for the future of the normalization process between Yerevan and Baku. Substantive work on the report was completed at the end of May 2026.

In addition to the conclusions and recommendations section, the report contains original analytical reflections on the strategic implications of the changes taking place around the South Caucasus and their impact, in the authors' view, on the most important challenges and opportunities facing the countries of the region. These contributions are divided into three thematic blocks: geopolitical and security developments and their influence on the South Caucasus and its neighborhood; energy,

transport, and infrastructure issues in the region and their implications for the EU; and the internal, international, and regional conditions shaping the peace process between Armenia and Azerbaijan, Georgia's role in the region, and the prospects for increased interdependence among the South Caucasus states, regional powers, and global actors.

The report seeks to capture a particularly interesting political moment in the South Caucasus and to understand its consequences for Europe and NATO, translating these dynamics into concrete policy recommendations. The growing interconnection between different security theaters and the growing mutual importance of Europe and the South Caucasus make it necessary to develop new forms of Western engagement aimed at building a resilient and mutually beneficial security architecture.

The South Caucasus: In the Shadow of Regional Conflicts and Global Realignments



Marcin Popławski

The Growing Strategic Importance of the Region

The South Caucasus is no longer an area whose political situation is determined solely by conflicts within the former Soviet space. Although Russia's aggression against Ukraine has the most significant and long-lasting consequences for its three states – Armenia, Azerbaijan and Georgia – the region is increasingly becoming part of a broader, multi-layered security system stretching from the eastern Mediterranean basin, through the Middle East, to the Black Sea and NATO's eastern flank. This belt, highly susceptible to the “domino effect” (particularly in the areas of energy, transport and trade), constitutes a space of strategic importance for the EU, NATO and Poland.

Destabilization in one part of this chain produces ripple effects across the others. Examples include the impact of Russia's aggression against Ukraine and the US–Israeli strikes on Iran on European energy security. The reconfiguration of suppliers triggered by the former (though not necessarily of supply routes and the infrastructure used for them after 2022), together with the disruptions in oil flows through the Strait of Hormuz caused by the latter, have confirmed the critical need

to strengthen transport routes across the region – including across the Caspian Sea – both for energy and for trade routes. In this new reality, energy resources from Central Asia and the South Caucasus (above all Kazakh oil and Azerbaijani gas), the development of the Middle Corridor linking Europe with China via the South Caucasus and Turkey, the Baku–Tbilisi–Ceyhan pipeline, and projects such as the US-backed TRIPP are gaining attention and strategic significance.

Despite the still fragile stability in the region following the Third Karabakh War, the South Caucasus states have now been presented with a ‘window of opportunity’. Almost all of their key international partners, for different reasons, currently favor the strengthening of regionalism, political stability, and the development of transport, trade and energy projects, as well as enhanced cooperation between Armenia, Azerbaijan and Georgia and the states of Central Asia. This favorable international consensus around the region is occurring amid Russia's weakening influence (with the notable exception of Georgia), Turkey's rising importance, and the redefinition of the roles of the United States and the European Union.

The Redefinition of Great Powers' Roles

The weakening of Russia as the traditional guarantor of regional order in the South Caucasus is a decisive factor. Crucial in this context is Moscow's full commitment of military and economic resources to the war in Ukraine and its prolonged entanglement there, which has undermined its credibility in the neighborhood. In the South Caucasus this effect is particularly visible: Armenia, until recently a formal ally within the CSTO, has had to seek new security guarantees outside Russia since 2023, while Azerbaijan, taking advantage of Moscow's weakening position and its strategic partnership with Turkey, has – with Russia's passive acquiescence – restored full control over Nagorno-Karabakh.

Turkey plays an increasingly strong role as a partner not only for the South Caucasus states but, given its expanding capabilities across a wide neighborhood – from the Black Sea, through Syria and Iraq, to the eastern Mediterranean – also in the entire 'domino belt'. Ankara is increasing its military presence (cooperation with Azerbaijan) and economic footprint in the South Caucasus (for example, through the expansion of SOCAR in Georgia), capitalizing on Russia's weakening. At the same time, Turkey signals that its economic ties with the region can support policies contributing to the normalization of relations with Yerevan and to progress on the Armenia-Azerbaijan track, including at the political level. Turkey is not interested in destabilizing the Middle East, as this would threaten its own security and economic projects. The main area of potential political conflict with Washington and Brussels remains the degree of their support for the growth of Israel's regional power and its aggressive policy in this part of the world.

The United States has moved into the role of an active, frontline actor in the South Caucasus that sets the regional agenda. The culmination of this shift was the summit at the White House on 8 August 2025, during which, under President Trump's auspices, the peace treaty between Armenia and Azerbaijan was signed and the Trump Route for International Peace and Prosperity (TRIPP) project was launched – a transport corridor through Armenian territory linking Azerbaijan with Nakhchivan. At the same time, relations with Azerbaijan were elevated to a strategic partnership, with declarations of deepened cooperation in energy, defense and digital infrastructure. In turn,

during the first-ever visit by a sitting US Vice President to Armenia, agreements were announced on the purchase of US armaments and technology. Many of these initiatives, however, remain at the level of political declarations and preliminary understandings – as is the case with the widely publicized TRIPP project. These developments create challenges for both countries. Armenia must balance its growing pro-Western orientation with the need to maintain workable relations with Russia and Iran. Azerbaijan, meanwhile, must reconcile its new strategic partnership with Washington and its longstanding alliance with Turkey, while also preserving stable relations with Russia and Iran to avoid upsetting the region's fragile balance.

The European Union has also undertaken a significant redefinition of its role in the South Caucasus, moving towards a more active, albeit still largely normative, role. The EU is engaged in stabilizing the region. The most important step in this regard was the launch in February 2023 of the EUMA mission to monitor the Armenia-Azerbaijan border, along with the extension of its mandate and increase in personnel, and the initiation in April 2026 of the EUPM Armenia mission, focused on hybrid resilience, cybersecurity and countering disinformation. In the same period, at the political level, the decision was taken to deepen relations with Armenia, a clear expression of which was the EU-Armenia summit in Yerevan in early May this year.



EUMA Patrol near Martuni, Armenia

Conclusion

The weakening of Russia's influence over the South Caucasus states does not automatically translate into increased Western influence in the region. The emerging vacuum is also being filled by other actors. In the political dimension, Turkey's role is growing particularly strongly; in the economic dimension, it is China's (for example, through stakes in the Georgian port of Anaklia or the sharp increase in trade with the region's states). To an ever greater extent, the South Caucasus states are conducting a multi-vector foreign policy in order to balance the interests of external actors and benefit from their

interest and engagement in the region. In this context, they also keep open channels of cooperation with Russia (particularly in the energy and trade dimensions) and remain open to implementing economic projects with China. For Western partners, especially the EU, this means that under current conditions it is essential to formulate an attractive and implementable political offer (with a security and military component) and an economic one, in order to engage in genuine competition with adversaries and rivals in this increasingly important region from the point of view of their own interests.



Monument in the capital of Nagorno-Karabakh, Stepanakert



The Security and Geopolitical Landscape of the South Caucasus



Maciej Mielnik

The South Caucasus and NATO's Eastern Flank

The South Caucasus should no longer be treated as an isolated post-Soviet conflict space. It is increasingly shaped by developments in the wider Middle East and forms part of a broader belt of instability stretching from the Eastern Mediterranean through the South Caucasus to the Black Sea.

In this context, the region's importance lies not only in local disputes, but also in its growing role as a transmission zone through which military escalation, geopolitical rivalry, corridor competition, energy insecurity, and hybrid pressure affect the wider Euro-Atlantic area.

The “domino effect” linking the Middle East, the South Caucasus, and NATO's Eastern Flank operates through several mutually reinforcing mechanisms rather than a single causal chain. Direct and indirect military spillover increases the risk that crises originating in the Middle East generate new security pressures in the South Caucasus. Regional power competition is increasingly shaping the local balance, especially where older security arrangements have weakened and external actors see greater room to expand influence. At the same

time, transport corridors, critical infrastructure, and energy routes have become both strategic assets and vulnerabilities, exposing the region to disruption, sabotage, and political pressure. Hybrid threats further blur the line between regional instability and Euro-Atlantic security by affecting infrastructure resilience, political cohesion, and the security of states on NATO's Eastern Flank.

It is suggested that the implications for Europe should be understood in layered terms. Armenia, Azerbaijan, and Georgia are directly exposed to shifts in Middle Eastern security dynamics. At the European level, instability in and around the South Caucasus affects energy security, trade routes, infrastructure resilience, and the wider strategic environment in the Black Sea region. For NATO's Eastern Flank, the cumulative effects of crisis spillover, strategic distraction, and hybrid pressure may increase the burden on deterrence and resilience policies. Seen in this way, the South Caucasus is no longer peripheral to Euro-Atlantic security planning; it is becoming increasingly relevant to how Europe assesses risk across interconnected theaters.



Agnieszka Legucka

Weaknesses in the Russian Sphere of Influence from Ukraine, through the South Caucasus, to the Middle East

Otto von Bismarck was right when he said that ‘Russia is never as strong or as weak as it appears’. What matters most, therefore, is how Russia is perceived — and that depends on our perceptions, images, knowledge, memory and observations. Russia is full of contrasts and can be weak and strong at the same time. For a long time, the Russian state apparatus has used propaganda and disinformation to shape how we think about what Russia is and what it can do.

Analyzing Russia’s sphere of influence — from Ukraine, through the South Caucasus, to the Middle East — one can clearly see a process of erosion of its position. In Ukraine, Russian aggression has not only severed political and social ties but has also led to the country’s permanent reorientation towards the West. Russia has lost both economic influence and the ability to exert political influence through traditional instruments.

In the South Caucasus, Russia’s weakness has become particularly evident in the context of regional conflicts. In its relations with Armenia, its formal ally within security structures, Russia has been unable to effectively guarantee security, undermining the credibility of its alliance commitments. At the same time, Azerbaijan is increasingly pursuing an independent policy, taking advantage of Moscow’s weakening position. As a result, Russia is no longer perceived as a reliable guarantor of security in the region.

In the Middle East, Russian influence is also showing signs of limitation. Although Moscow maintains a military presence in Syria, its ability to shape long-term political processes is constrained, and its partnerships are transactional and short-term in nature.

Russia does not offer a coherent vision of economic cooperation or long-term investment, making it a less attractive partner than other global players. Across the entire area, Russia’s weakening economic power is evident. Its model based on raw material exports does not translate into long-term development partnerships. In many cases, Russia fails to meet its economic commitments or treats relations instrumentally, which undermines trust and encourages the countries of the region to diversify their cooperation.

The same applies in the military sphere. Although Russia still possesses significant potential, its ability to project power and fulfill alliance commitments is increasingly coming into question. Inconsistency of action, limited resources and a focus on selected conflicts mean that partners increasingly see it as an unreliable guarantor of security. Russia also has problems maintaining alliances and partnerships. It often fails to respect the autonomy of its partners, treating them as elements of its own sphere of influence, which generates tensions and encourages distancing from Moscow.

As a result, many countries in the region are pursuing a multi-vector policy, limiting their dependence on Russia and seeking more predictable partners such as the European Union or other global powers. All these factors indicate that, despite its continuing imperial ambitions, Russia’s real capacity to maintain and develop influence in its neighborhood is gradually diminishing.



Jakob Hedenskog

A Northern Euro-Atlantic View on the Domino Effect

What are the implications of the domino effect between the Middle East, South Caucasus, and Russia-Ukraine for the northern part of the Euro-Atlantic security system?

The main implication is that the northern part of the Euro-Atlantic security system must treat the Middle East, the South Caucasus, and the war between Russia and Ukraine as a coherent chain of pressures, not as separate crises. As tensions rise in one zone, they can move through energy, transport, migration, cyber activity, proxy warfare, and diplomatic distraction into the European north and the NATO flank.

The intertwining of the war in the Middle East with the Russian war in Ukraine has been ongoing since the start of the Russian full-scale invasion, when the Russia-Iranian military cooperation, especially regarding drones, made the Islamic Republic a key Russian partner in the war. After the US and Israeli attack on Iran, Ukrainian expertise in anti-drones became valuable to the Gulf States. The fact that the US, in the first week of the war, consumed more Patriot air-defense-missiles than Ukraine did in the first four years of the full-scale war shows the limits of US hegemony in military production, which in extension also can affect Europe and Ukraine.

For the northern part of the Euro-Atlantic system, the greatest risks are not only military escalation but also cumulative strategic strain. These include upward pressure on energy markets, higher inflation, more vulnerable supply routes, greater cyber and sabotage exposure, and faster political polarization within NATO and EU states.

One of the greatest and most urgent risks is that Iran is spreading terrorism within organized crime networks against Jewish, US, Israeli and Western targets in the countries more generally. This has already been identified as a serious problem in Sweden, for example, where organized crime networks are a major problem. Following the 2026 attack on Iran, the Swedish Security Police, Säpo, has warned about the increased threat of Iranian recruitment of criminals, cyberattacks, and surveillance, exacerbating the existing threats on the country from Russia and China.



Baku Bay, Baku, Azerbaijan



Valeria Giannotta

Türkiye's Regional Role

Türkiye sits at the center of the South Caucasus regions' profound transformation, acting not as a passive beneficiary, but as an active architect. The most recent dynamics mark Türkiye's shift from a peripheral partner to a key actor.

Most recently, Türkiye and Azerbaijan significantly redefined their bilateral security relationship, evolving from a historically close partnership into a formal strategic alliance. The 2020 Second Karabakh War proved the effectiveness of Türkiye's military support in reshaping conflict dynamics. Along with the 2021 Shusha Declaration, this established a strategic defense partnership by framing a more coordinated regional posture. In this context, Ankara has pragmatically filled the vacuum left by Russia's declining hegemony, especially following the official termination of the OSCE Minsk Group. Indeed, Ankara did not just fill the security void, but aims at more regional engagement through diplomacy, infrastructure, and institutional frameworks.

When in August 2025, Armenian and Azerbaijani leaders participated in a US-hosted summit, initialled a draft peace treaty and signed a transport connectivity framework called the 'Trump Route for International Peace and Prosperity' (TRIPP), Türkiye confirmed its pivoting position in ensuring the corridor's long-term viability. Moreover, one of the most notable developments is the Turkish rapprochement with Armenia, which forms an integral part of the regional context. It is worth noting that, following Armenian Prime Minister Nikol Pashinyan meeting with Turkish President Erdoğan in Istanbul in June 2025, much further progress has been made in terms of trade, logistics, energy and public diplomacy. In this evolving regional frame, the end of the Armenian-

Azerbaijani conflict cycle has to be read as the most effective resolution.

The TRIPP deal has materially reduced the risk of renewed war by opening space for economic interaction and confidence-building measures. In terms of economic integration and connectivity, the new corridor integrates the region into the global trade map, heralding a new era of investment. Hence, Türkiye arises as the main stabilization actor. Türkiye's long standing NATO membership and its effective regional power position makes Ankara a positive mediator.

In short, the current developments in the South Caucasus pivot on Türkiye's security alliance with Azerbaijan, diplomatic normalization with Armenia and geoeconomic infrastructure play. The main issues and challenges stem from the fact that some other regional actors, from Tehran to Moscow, may oppose the architecture that has been recently built. Moreover, the results of the upcoming Armenian elections may create a further margin of uncertainty.

When it comes to Iran, since early 2025, the balance of power has shifted decisively in Ankara's favor. The brief 12-day war between Iran and Israel placed two of Türkiye's main competitors in direct confrontation, leaving Ankara comparatively stronger. Iran's land bridge to the Mediterranean has de facto collapsed, while Ankara is filling the gap in Syria.

Ankara explicitly does not want Tehran to fall and the regional order to further disrupt. Indeed, a post-regime scenario in Tehran could weaken Ankara's strategic position, intensify refugee pressure, and reshape

the Kurdish question across the region, overall in a time when the Turkish government is investing a great deal in renewing the peace process with the PKK. In February 2026, however, the tension escalated. Iran fired ballistic missiles toward Turkish territory on multiple occasions that were all intercepted by NATO air defense systems. Ankara proved its balancing diplomacy approach by facing direct Iranian provocation, while simultaneously opposing the US-Israeli campaign against Iran. Once more Türkiye has proven its mediation skills on different tables, in addition by endorsing the talks in Pakistan.

As a matter of fact, the war marked Türkiye's energy and economic exposure while compelling rapid acceleration of Ankara's defense project. Security, also in terms of migration management and containment of threats by Kurdish terrorist groups at its border, is Ankara's main priority issue. In this regard, Türkiye balancing diplomacy may continue due to Ankara's geographical location and geopolitical stance; however, the main question is its long-term sustainability in a highly fragmented regional and international environment.



Istanbul and Bosphorus Bridge



Marcin Krzyżanowski

First Domino Piece or Bedrock of Security? The Impact of Iran on the Security of the South Caucasus and NATO's Eastern Flank

Introduction

The ongoing conflict-driven transformation of the Middle East has fundamentally altered the strategic environment of the wider Eurasian region. Among the actors shaping this transformation, the Islamic Republic of Iran occupies a unique position. Located at the intersection of the Middle East, the Caucasus, Central Asia, and, to some extent, the Black Sea

and Eastern Mediterranean regions, Iran is increasingly influencing security dynamics beyond its immediate neighborhood. The consequences of Tehran's policies extend directly to the South Caucasus and indirectly to NATO's Eastern Flank, making Iran an important factor in contemporary Euro-Atlantic security calculations.

The author argues that Iran's growing geopolitical activism, combined with shifting regional power

balances after the Second Karabakh War, its direct war with the United States, and the ongoing emergence of new transport corridors, has transformed Tehran from a peripheral actor into a significant security stakeholder in the South Caucasus. Consequently, Iran's actions affect not only Armenia, Azerbaijan, and Georgia but also the broader strategic environment facing NATO in Eastern Europe.

Iran's Strategic Interests in the South Caucasus

The South Caucasus has traditionally occupied a special place in Iranian strategic thinking. Tehran shares borders with both Armenia and Azerbaijan and maintains historical, cultural, and economic ties throughout the region. At the same time, Iranian policymakers perceive the South Caucasus through the prism of national security and regime stability.

Four core interests shape Iran's regional policy. First, Tehran seeks to prevent the emergence of a regional order totally dominated by external powers, particularly the United States, NATO, and Israel. Second, Iran aims to preserve stable access to regional transportation networks connecting the Persian Gulf with the Black Sea and Europe. Third, Tehran seeks to avoid territorial or political developments that could stimulate separatist sentiments among Iran's large Azerbaijani population. Fourth, Tehran wants to limit the growth of Azerbaijan's power.

The aftermath of the 2020 Second Karabakh War significantly challenged these interests. Azerbaijan's military victory, supported by Türkiye and facilitated by advanced Israeli military technology, altered the regional balance of power. For Tehran, the growing strategic partnership between Azerbaijan and Israel became a major security concern. Iranian officials have increasingly portrayed Israeli activities in Azerbaijan as a direct threat to Iranian national security.

The Zangezur Corridor and Iranian Strategic Concerns

One of the most contentious issues in contemporary regional geopolitics is the proposed so-called Zangezur Corridor linking mainland Azerbaijan with the Nakhchivan Autonomous Republic through southern Armenia. From Tehran's perspective, any arrangement that weakens the Armenia-Iran border would have

profound geopolitical consequences. The current border provides Iran with a direct land connection to the South Caucasus and Eurasia. Iranian leaders fear that a corridor operating outside Armenian sovereignty could reduce Iran's strategic relevance, strengthen Turkish influence, and facilitate greater Western or Israeli access to the region. As a result, Iran has repeatedly demonstrated its readiness to oppose any geopolitical rearrangement that would alter existing international borders. Military exercises near the Azerbaijani border since 2021 have served both deterrent and signaling functions, highlighting Tehran's willingness to defend what it perceives as vital national interests.

Iran, Armenia, and Azerbaijan: Balancing Between Rivals

Iran's policy toward Armenia and Azerbaijan is often misunderstood as pro-Armenian. In reality, Tehran pursues a pragmatic balancing strategy designed to maximize its influence while preventing the dominance of any single regional actor.

Relations with Armenia have deepened in recent years due to converging strategic interests. Armenia provides Iran with a crucial economic and geopolitical outlet amid international sanctions and regional isolation. Energy cooperation, infrastructure projects, and transport connectivity have strengthened bilateral ties. Simultaneously, Iran seeks to maintain functional relations with Azerbaijan despite recurring tensions. Economic cooperation, cross-border trade, and energy exchanges continue alongside political disputes. Nevertheless, mutual distrust remains high due to Azerbaijan's close relations with Israel and Iran's concerns regarding Azerbaijani nationalism. This balancing strategy reflects Tehran's broader objective of preserving a regional equilibrium that prevents the emergence of hostile coalitions on its northern frontier.

Implications for NATO's Eastern Flank

Although Iran is geographically distant from NATO's Eastern Flank, developments in the South Caucasus increasingly affect Euro-Atlantic security. First, instability in the South Caucasus threatens critical transport and energy corridors connecting the Caspian Basin with Europe. These routes have gained strategic

importance as European states seek to diversify energy supplies and reduce dependence on Russia. Second, growing military cooperation between Iran and Russia has created new security challenges. Since the outbreak of the war in Ukraine, Tehran and Moscow have significantly expanded defense cooperation. Iranian drone technology and military-industrial collaboration have strengthened Russia's ability to sustain prolonged military operations. This partnership indirectly affects the security environment along NATO's Eastern Flank by enhancing Russian capabilities and complicating deterrence efforts. Third, Iran's participation in emerging anti-Western geopolitical alignments contributes to the gradual consolidation of a revisionist bloc that includes Russia and, increasingly, China. While these partnerships remain asymmetrical and driven by pragmatic interests rather than ideological unity, they nevertheless challenge the existing regional security architecture. Finally, potential escalation involving Iran—whether related to its nuclear program, regional proxy networks, or confrontation with Israel—could generate secondary effects across the Black Sea region and the South Caucasus. Such developments would inevitably influence NATO's strategic planning and force posture in Eastern Europe.

Conclusion

Iran's influence on the security of the South Caucasus and NATO's Eastern Flank is likely to increase rather than diminish in the coming years. Tehran views the South Caucasus as a critical buffer zone where regional power balances directly affect Iranian national security. Consequently, Iran actively seeks to shape political, military, and economic developments in the region. For NATO and European policymakers, understanding Iran's strategic calculus is essential. The South Caucasus can no longer be viewed solely as a local arena of Armenian-Azerbaijani competition. It has become a geopolitical crossroads where the interests of regional and global powers intersect. Iran's role within this evolving environment represents an increasingly important variable in assessing future security challenges from the Middle East to Eastern Europe. As long as Iran exists as a coherent political and military force, it will try to challenge the so-called "Pax Americana." However, the real danger to regional security would be the collapse of Iran as a state. In such a case, Iran would become the first domino piece to fall.



Residents in Tehran on the third day of US-Israeli airstrikes, 3 March 2026



Rauf Mirgadirov

Geopolitical Transformations: Russia, Europe, the Middle East and the South Caucasus

The key factor that determines the current dynamics of international processes is Russian policy. It is important to emphasize that we are not talking about situational changes, but about a long-term trend that can be traced back at least to 2007. It was then, during Vladimir Putin's speech, that a sharp turn in Russian foreign policy was signalled – a turn that, unfortunately, was not properly understood in Europe or in the West as a whole.

In fact, Putin's Munich speech of 2007 became a kind of mirror image of Winston Churchill's Fulton speech of 1946. If Churchill announced the beginning of the Cold War, Putin essentially signalled readiness for its new interpretation – already in a post-bipolar world.

After that, Russia quickly moved to a policy of pressure against the West, including through proxy wars. Georgia was the first victim of this strategy. Yet even then, the West did not fully grasp the scale of the changes taking place and continued to assume that it was possible to reach an agreement with Moscow. Obama even launched a 'reset' of relations with Russia.

A similar situation repeated itself in 2014 after the annexation of Crimea and the beginning of the conflict in eastern Ukraine. Despite clear signs of escalation, a significant part of Western political and expert circles continued to believe in the possibility of compromise. The logical conclusion of this line was Russia's full-scale invasion of Ukraine in 2022.

The European Factor: The Problem of Subjectivity

Against the background of these events, the question of Europe's and the European Union's role is increasingly being raised. Many experts explain the EU's weakness through its institutional features – the need to reach

consensus among member states.

The problem concerns Europe's insufficient political and military-political subjectivity. Although after the Second World War a system of collective security was created – with NATO as its key element – the process of forming Europe as an independent geopolitical center has never been completed.

In times of crisis, it is the military component that becomes the decisive factor. In this sense, Europe remains heavily dependent on the United States. This dependence allows Washington to exert significant influence on European policy and creates opportunities for manipulation by other global players, including Russia and China.

After the end of the Cold War, many European states essentially "relaxed", focusing their resources on socio-economic development. Military and power components were reduced. As a result, Europe today faces a situation in which it is not an independent center of power capable of determining the course of geopolitical processes.



View of Kyiv and Dniro River



Energy and Connectivity in the South Caucasus – the region's significance



Szymon Kardaś

The South Caucasus on Europe's Energy Map: How the Conflict with Iran Presents Challenges and New Opportunities for the EU

The US and Israeli attack on Iran triggered the most severe energy crisis in history. Serious implications for global energy markets will be felt for many months. After the first month of the conflict, oil production in the Middle East was reduced by 10.1 million b/d, or approximately 10% of global supply. The hostilities led to a drastic reduction in traffic through the Strait of Hormuz (by 95%), through which approximately 20 million b/d of crude oil and petroleum products were exported prior to the war. Approximately 80 energy facilities were damaged, and repairs may take several years in some cases (Qatar, one of the world's largest LNG producers, reported damage to 17% of its LNG production facilities, which may take 3–5 years to repair).

Although the EU does not directly import significant quantities of fossil fuels from the Middle East region, due to its overall high dependence on oil (90%) and gas (85%) imports, it may be directly affected by the consequences of the crisis. This is particularly true given that the EU plans to completely phase out imports of Russian energy by 2027.

In this context, all alternative channels for importing fossil fuels take on even greater strategic importance

for the EU. This also applies to the South Caucasus. Although Azerbaijan is not among the key exporters of fossil fuels to the EU, in the face of the crisis even these small quantities matter. Azerbaijan's share of gas imports to the EU stood at just under 4% in 2025, and 4.1% for oil.

At the same time, the role of the Black Sea as a transit route has gained much greater strategic importance. A significant portion of Kazakh oil reaches the EU via the Caspian Pipeline Consortium pipeline and then the terminal in Novorossiysk, and Kazakhstan's share of EU imports stands at 12.8% (making it the third-largest supplier of this resource to the EU).

Beyond fossil fuel supplies, the countries of the South Caucasus, and in particular Azerbaijan, can also be valuable partners for the EU in the field of clean energy. As early as 2022, the first agreement was signed regarding the construction of the Green Electricity Bridge from Azerbaijan through Georgia, the Black Sea, Romania, and Hungary. Central Asian countries—Kazakhstan and Uzbekistan—have also joined the initiative, as they are interested in producing and exporting clean

energy across the Caspian Sea to Azerbaijan and onward to the European Union. The initiative aligns perfectly with the EU's policy of decarbonization and reducing dependence on fossil fuels from Russia. The expansion of such connections simultaneously strengthens the position of the South Caucasus countries as EU partners in the field of sustainable development.

The so-called Middle Corridor running through the South Caucasus may also be significant in the context of plans to extract and export critical raw materials from Central Asian countries and to produce and export hydrogen from Kazakhstan. Germany is implementing the Hyrasia One project with Kazakh partners – one of the largest hydrogen projects in the world.

Given that the role of the South Caucasus and the Caspian and Black Sea basins will continue to grow, greater engagement by the EU, NATO, and member states in the region is essential. The European Union should significantly increase its investments in the development of South Caucasus transit routes – not only for economic

reasons, but above all as part of a long-term energy security strategy. In particular, this should focus on securing transit routes for the transport of fossil fuels and clean energy. The ongoing experiences of NATO and EU countries regarding challenges to energy infrastructure security in the Baltic region can be valuable in addressing analogous challenges in the South Caucasus and Black Sea regions.

Greater engagement by the EU and its member states will also have a positive impact on the process of stabilizing the geopolitical situation in the South Caucasus. Strengthening energy cooperation could serve to fill the vacuum left by Russia's waning influence and to balance the ambitions of the U.S. or Turkey. Sustained EU investments in infrastructure, logistics, green transport, and renewable energy in the region would not only be an element of cohesion and enlargement policy but also a tool for exerting real influence on shaping a stable EU neighborhood. It would also be an opportunity to strengthen the EU's geopolitical role, which remains more of a work in progress than a reality.



Satellite imagery of black smoke rising from the Port of Salalah during the 2026 Iranian strikes on Oman



Elene Kintsurashvili

Trade Corridors Policy in the South Caucasus

Transport and trade corridors have emerged as one of the defining strategic issues in the South Caucasus. Connectivity is no longer viewed primarily through an economic lens; it has become deeply intertwined with questions of security, geopolitical influence, and regional order.

Two geopolitical developments have fundamentally altered the region's strategic significance. First, Russia's full-scale invasion of Ukraine in 2022 accelerated efforts by European and international actors to reduce dependence on transit routes crossing Russian territory. Second, growing instability surrounding Iran and escalating tensions between Tehran and Washington have increased concerns about the long-term reliability of southern transit routes. Together, these developments have elevated the South Caucasus from a transit region of secondary importance to a critical component of emerging Eurasian connectivity architectures.

This shift has increased the strategic relevance of infrastructure projects such as the Trans-Caspian International Transport Route, known as the Middle Corridor, the Southern Gas Corridor, and the Baku–Tbilisi–Ceyhan pipeline. Originally conceived as economic and energy initiatives, these routes are increasingly viewed as instruments of resilience and strategic diversification. For European actors in particular, corridor development has become closely linked to broader efforts to reduce dependence on Russia, strengthen supply-chain security, and improve access to Central Asian markets and resources. In this context, initiatives such as the EU's Global Gateway strategy reflect a broader shift in European engagement with its neighborhood, combining traditional objectives related to connectivity and regulatory integration with growing geopolitical and economic considerations. As a result, infrastructure

investments are increasingly viewed not only as tools of development and cooperation, but also as instruments for advancing strategic interests and strengthening Europe's position in an increasingly competitive geopolitical environment. For European actors in particular, corridor development has become closely linked to both immediate and long-term broader efforts to reduce dependence on Russia, strengthen supply-chain security, and improve access to Central Asian markets and resources.

The growing prominence of connectivity reflects a broader transformation in international politics. Infrastructure is no longer politically neutral. Transport routes, ports, railways, pipelines, and digital networks have become tools through which states project influence, shape regional dependencies, and compete for strategic advantage. In the South Caucasus, this trend is particularly visible as regional and extra-regional actors seek to embed their interests within emerging connectivity architectures.

As a result, the region is increasingly becoming a site of competing geopolitical visions. The European Union largely approaches connectivity through the lens of diversification, resilience, and regulatory integration. Türkiye views corridor development as an opportunity to strengthen its role as a regional hub linking Europe, the Caucasus, and Central Asia, and the Middle East. China views the region as a potential component of broader Eurasian connectivity networks and has generally supported the development of the Middle Corridor as a means of preserving access to alternative routes to Europe beyond the Northern Corridor. While overland and multimodal routes remain relatively limited in importance compared to maritime trade routes, Beijing has an interest in maintaining a presence in emerging connectivity initiatives and diversifying its logistical

options across Eurasia. Russia, in contrast, seeks to preserve its influence over regional transit flows despite the erosion of its traditional dominance. Iran, meanwhile, remains concerned that alternative routes could weaken its strategic relevance and diminish its role as a transit state between the Caspian Sea and the Persian Gulf.

The United States has also become increasingly active in this space. Washington's support for connectivity initiatives reflects both economic and geopolitical objectives. Beyond facilitating trade, corridor development is increasingly viewed as a mechanism for shaping regional alignments, limiting adversarial influence, and reinforcing Western presence across Eurasia. Initiatives such as the Trump Route for International Peace and Prosperity (TRIPP) illustrate how infrastructure is becoming integrated into broader strategic competition, linking economic development with political and security objectives. TRIPP is a multimodal transport corridor project designed to create a direct transit link through southern Armenia, connecting mainland Azerbaijan with its Nakhchivan exclave.

If implemented successfully, TRIPP could significantly enhance the strategic importance of both Armenia and Azerbaijan by creating new transit links between the Caspian Basin, Türkiye, and European markets. In doing so, it would reshape existing patterns of regional connectivity and strengthen the role of both countries within emerging Eurasian trade networks. The initiative reflects a broader shift in US thinking, whereby connectivity is increasingly viewed as a geopolitical instrument rather than simply an economic opportunity.

At the same time, the growing focus on Armenia and Azerbaijan should not obscure Georgia's continued strategic relevance. Georgia remains a critical component of the broader Black Sea–South Caucasus connectivity architecture, hosting key segments of the Middle Corridor and serving as an essential transit route linking the Caspian region to European markets. Beyond its role in trade and transport, Georgia occupies a strategically significant position at the intersection of the Black Sea, the South Caucasus, and wider Eurasian transit networks.

Moreover, Georgia's importance extends beyond connectivity alone. While projects such as TRIPP seek to reshape regional economic geography, Russia continues



Georgian street market

to view Georgia through a broader strategic lens. Moscow's efforts to strengthen its position in occupied Abkhazia, including plans to develop the Ochamchire naval facility, underscore the country's enduring significance for Black Sea security and regional power projection. The development of the Ochamchire naval facility may also complicate the strategic environment in which connectivity initiatives such as TRIPP and the Middle Corridor operate. By expanding Russia's capacity to project power in the eastern Black Sea, it could heighten perceptions of geopolitical risk among investors, shipping operators, and regional partners, potentially affecting the attractiveness and long-term viability of these routes. More broadly, the case illustrates how the success of connectivity initiatives depends not only on infrastructure investments and commercial demand, but also on the security environment through which they pass. As economic corridors increasingly become instruments of geopolitical competition, their resilience will be shaped as much by regional security dynamics as by economic considerations.

At the same time that Georgia seeks to position itself as a connectivity hub through projects such as the Anaklia deep-sea port, which is being developed in partnership with a Chinese-Singaporean consortium, Russia is expanding its military footprint along the eastern Black Sea coast. Together, these developments illustrate the dual nature of contemporary competition in the South Caucasus, where economic connectivity and military positioning increasingly intersect.

Despite broad rhetorical support for enhanced connectivity, there remains no consensus on how regional corridors should be structured, governed, or secured. Competing national interests, unresolved political disputes, and divergent external priorities continue to constrain efforts to establish a coherent regional framework. This governance deficit is particularly significant because infrastructure development increasingly shapes political realities. Decisions regarding transit routes determine which states become indispensable hubs, which actors gain economic leverage, and which countries risk

strategic marginalization.

Ultimately, the future of connectivity in the South Caucasus will depend not only on the construction of physical infrastructure but also on the development of a shared political framework capable of balancing competing interests. Without such a framework, transport corridors risk becoming increasingly securitized, transforming infrastructure into another arena of geopolitical rivalry. Under these conditions, connectivity may enhance interdependence, but it will not necessarily produce stability.

The central challenge for regional and external actors alike is therefore not simply how to build corridors, but how to govern them. Whether connectivity becomes a foundation for cooperation or a source of renewed competition will shape the future strategic landscape of the South Caucasus for years to come.



Adam Michalski

A New Route Through the Caucasus

The South Caucasus is entering a volatile yet potentially transformative period in the reconfiguration of trade and transport corridors. In discussions of the Middle Corridor, Georgia and Azerbaijan have traditionally occupied central positions. Their geography has enabled goods to move relatively unobstructed from the Caspian Sea to the Black Sea and onward to Turkey and Europe. Armenia, by contrast, has remained politically and economically isolated due to its closed borders with Turkey and Azerbaijan. As a result, it has not achieved comparable status as a regional transport hub.

This long-standing configuration, however, is beginning to shift. Developments in Georgia may have significant implications for regional connectivity. The country's increasingly authoritarian trajectory and perceived alignment with Russia have strained relations with

the European Union, one of the key external actors supporting the development of Georgia's transport infrastructure. These trends may also generate concern in Ankara and Baku. For Turkey and Azerbaijan, Tbilisi's drift towards Moscow could be interpreted as a sign of renewed Russian ambitions in the Caucasus, particularly after Moscow's influence appeared to weaken following the wars over Karabakh in 2020 and 2023.

This matters because the Middle Corridor depends heavily on Georgia. Without a reliable Georgian route, the corridor's function as a stable link between the Caspian Sea, the Black Sea, and Turkey would be severely undermined. Trade routes are never merely technical; they are deeply political. Armenia's decades-long isolation demonstrates how geopolitical disputes can shape, restrict, or redirect connectivity.

If Georgia is increasingly perceived as an unstable or unreliable transit state, Turkey and Azerbaijan may have stronger incentives to support alternative routes. This could, in turn, increase the urgency of finalizing peace and normalization processes involving Armenia, Azerbaijan, and Turkey.

Yerevan appears to be positioning itself for such a scenario. Armenia has actively promoted its “Crossroads of Peace” initiative, which seeks to reconnect the country with Turkey and Azerbaijan through rail and road links. Similarly, proposals such as the Trump Route for International Peace and Prosperity, envisaging a transit connection through Armenia’s southern Syunik province between mainland Azerbaijan and the Nakhchivan exclave, fit into the broader agenda of unlocking Armenia’s transport potential. If Yerevan succeeds in resolving its disputes with its neighbors and reopening border crossings for regional transit, Armenia could offer not only a shorter route across the Caucasus, but also a pathway towards its own economic and political reintegration into the region.

Such a development would represent a major geopolitical shift. However, two caveats are essential. First, Armenia’s current political leadership would need to maintain power in the forthcoming elections. Prime Minister Nikol Pashinyan has been the principal advocate of Armenia’s connectivity agenda and of normalization with Turkey

and Azerbaijan. Continuity in Yerevan’s foreign policy would therefore be crucial if this vision is to materialize. Second, Armenia would need substantial investment to modernize transport infrastructure that has suffered from decades of neglect. This would require significant external funding.

The European Union could play an important role in this regard. If Brussels becomes less willing to support major connectivity projects in Georgia due to concerns over democratic backsliding and Russian influence, Armenia may emerge as a more attractive recipient of EU-backed infrastructure investment. In this sense, Armenia could become one of the principal beneficiaries of the political reshuffling currently underway in the South Caucasus.

Yet this remains conditional. Armenia’s transformation into a meaningful regional transit hub is not inevitable. It depends above all on the successful settlement of its disputes with Azerbaijan and Turkey. Without durable normalization and credible security guarantees, Armenia’s connectivity agenda will remain aspirational. The potential is significant, but it can only be realized if political reconciliation precedes infrastructural ambition.



Monument to Medea on Europe Square in Batumi Georgia



The New South Caucasus from a Regional Perspective



Mariusz Marszewski

The South Caucasus: One Political Region or Three Distinct States?

The South Caucasus is still primarily a framework of three distinct, sovereign states rather than a single cohesive political region.

For many global analytical circles, the South Caucasus countries – Armenia, Azerbaijan, and Georgia – share a common Caucasian geography and a postcolonial (post-Soviet) history. However, their divergent geopolitical allegiances, economic models, and conflicting national interests have in many cases prevented them from operating as one unified entity. Another key factor is the three charismatic political leaders of the South Caucasus states, their long tenure in power, and the political systems built around them. Each leader also has his own distinct vision for the future of his state.

At first glance, the region functions as three separate states because of these diverging alliances and foreign policies. Georgia has sought integration with the West; however, it faces domestic polarization and its main strategic partner is now the Russian Federation. Azerbaijan leverages its vast energy resources to build independent partnerships, particularly

with Turkey and the Central Asian states (now in the C6 format, with particularly strong and growing ties with Kazakhstan and Uzbekistan), as well as with other important Turkish allies such as Pakistan and Malaysia. At the same time, Azerbaijan has systematically built strong relations and partnerships with the State of Israel, becoming one of Israel's key allies in the Muslim world. Armenia, after gaining independence in 1991, was allied with the Russian Federation and the Islamic Republic of Iran. In recent years, however, it has increasingly pivoted toward the European Union, the United States, and other non-traditional partners such as India to achieve its security goals.

Another reason for this “anti-regional” perception of the South Caucasus in the global analytical environment is its deeply rooted bilateral tensions. Decades of active conflict, most notably between Armenia and Azerbaijan over the disputed Armenian autonomous region (periodically Armenian parastatal entity) of Nagorno-Karabakh, have resulted in highly militarized borders and closed trade routes. Although, after a series of military conflicts in recent decades, Azerbaijan and Armenia have

engaged in bilateral peace negotiations to normalize relations, full regional integration remains elusive.

The third cause of the regional “negationism” of the South Caucasus in the global analytical environment lies in contested external interests and contrasting economic trajectories.

From the first analytical glance, the region’s geography acts as a crossroads where larger powers – specifically Russia, Turkey, and Iran, as well as other global actors such as the USA, Europe, China, India, and Israel – compete for strategic influence. This external competition frequently pulls the three countries apart rather than drawing them together.

At the same time, the economic foundations of the three states differ significantly. Azerbaijan is an oil-and-gas-rich powerhouse on the Caspian Sea, while Georgia and Armenia are smaller, landlocked or Black Sea-oriented economies heavily dependent on transit, tourism, and remittances from migrant workers abroad. However, the key word in these complicated relations is economic cooperation – the main national agenda of the three South Caucasus states. The regional interests and geopolitical landscape have also been profoundly transformed by the effects of two neighboring regional wars – the conflict in Ukraine and the Iranian conflict. The construction of an authoritarian system of government is progressing in Georgia. This is one of the significant direct consequences of the current phase of the war in Ukraine, which has been ongoing since 2022, for the South Caucasus.

Nevertheless, despite their divergent political goals, all three South Caucasus countries share a strong common interest in economic development. This focus is essential for their political leaderships, as it helps maintain domestic stability and legitimize their rule. In this sense, they do constitute a region. Although each country defines and implements its economic policy goals differently, they are capable of effective economic cooperation. For Georgia, stability and good relations with Russia (due to its economic dependence on its northern neighbor) are crucial. At the same time, developing common economic and commercial relations with Azerbaijan (and subsequently with China) and strengthening trade along the routes connecting China with the European Union are extremely important.

Therefore, the South Caucasus countries also have – as paradoxical as it may sound – clearly defined common regional goals. Azerbaijan serves as a source of energy resources, while Georgia and Armenia play important roles as transit corridors. These routes could also serve Azerbaijani resources. Trade cooperation follows this crucial logic. To achieve these political and economic goals, political stabilization of the region is essential. The political leadership of all three countries is committed to this.

In this framework, Azerbaijan remains the decisive regional power. This stems from its significantly greater economic and demographic potential, as well as its strategic partnership with Turkey (based on the idea of “one nation, two states,” which is perfectly justified by national, religious, and historical reasons). However, to achieve the ambitious goals of this historic partnership, Azerbaijan is destined to cooperate with Georgia and Armenia. An additional factor strengthening this trilateral regional cooperation is trade with the two ends of the “New Silk Road” – the European Union and China – as well as the complex relationship that all three South Caucasus states maintain with Russia, which is perceived as a dominant, asymmetrically powerful partner and a potential source of threat due to its imperial political ambitions.



Georgian landscape of Svaneti mountains



Marcin Popławski

In Search of Intra-Regional Stability

The most visible evidence of the new reality of the South Caucasus is the markedly greater ability of its states – particularly Azerbaijan and Armenia, and to some extent also Georgia – to balance the interests of external actors. This has occurred in reaction to Russia's weakening since 2022. In this sense, the states of the region are actively exploiting the emerging power vacuum to pursue their own goals and national interests. This process is taking place amid strong social control and authoritarianism, most notably in Azerbaijan, as well as Georgia's authoritarian drift and Armenia's internal political volatility. In their political narratives – especially in Baku and Tbilisi – there is a growing emphasis on the unwillingness to be treated as a “buffer” or “tool” in the relations between external powers.

The clearest example of the increase in genuine political agency in the region is Azerbaijan. The full restoration of control over Nagorno-Karabakh in 2023 was not only a military success but also a strategic breakthrough. Through close – including military – cooperation with Turkey, the country has become one of the biggest beneficiaries of Russia's weakening, enabling it to dictate the peace agenda in its relations with Armenia. A symbolic demonstration of this new assertiveness towards Moscow was Baku's firm stance following the downing of its passenger aircraft by Russian forces in December 2024 over Kazakhstan, as well as its ability to develop military cooperation with Ukraine. At the same time, Azerbaijan participates in all major American initiatives launched after Donald Trump's return to the presidency, maintains military cooperation with Israel, and continues to strengthen its role as an energy hub between the Caspian and the Black Sea and as a key supplier of natural gas to the EU – without provoking criticism or restrictive measures regarding its authoritarian system of governance.

Armenia, in turn, is undergoing the deepest redefinition of its security policy in its recent history. The formal freezing of its membership in the CSTO and its manifest rapprochement with the EU (exemplified by Emmanuel Macron's recent visit to Yerevan) and the West (including acceptance of American patronage over the peace process with Azerbaijan) are clear expressions of pursuing its own national interest under the new circumstances. However, Armenia's situation remains highly complex. The decision to loosen ties with Russia – its long-standing security guarantor – and to seek new partnerships (with EU countries, Turkey, Iran and India) is fraught with uncertainty regarding the conclusion of lasting peace with Azerbaijan and the country's internal political dynamics, including the survival of Prime Minister Pashinyan's government.

Armenia-Azerbaijan relations remain the most delicate element of the regional puzzle. Following the Third Karabakh War, the region entered a phase of strategic uncertainty. A real chance for normalization and a lasting peace agreement exists, yet the risk of renewed escalation remains at a moderate level. The key factor is primarily Azerbaijan's posture, which more frequently escalates its demands on Yerevan (such as pressure to amend the Armenian constitution) than the other way around, as well as the ability of external partners – above all Washington, Brussels and Ankara – to create favorable, pragmatic conditions for an agreement. Given the current political situation in both Azerbaijan and Armenia, it is highly unlikely that any agreement will adequately take social factors into account, including dialogue between Azerbaijanis and Armenians. In this context, the foundations for pragmatic regionalism based on interdependence may be provided by economic and business impulses, above all the development of transport corridors and raw-materials and energy cooperation.

A serious challenge to the stabilization and cohesion of the entire region remains Georgia's policy. The halting of the European integration process, the persistent repressiveness of the authorities towards civil society, and Tbilisi's consistently ambivalent – in practice increasingly pro-Russian – stance, including its facilitation of sanctions evasion in favor of Russia, have led to a “dead end” in relations with the EU. Georgian ruling elites appear to have significantly overestimated the importance of the country's geographical location

in their calculations. They assumed that, regardless of the direction of its domestic and foreign policy, Georgia would remain an indispensable and irreplaceable element of the Middle Corridor for the EU. Meanwhile, its authoritarian drift and rapprochement with Moscow are eroding the trust of European partners and turning Georgia – paradoxically – into a strategic weakness and a brake on regionalism.



Elene Kintsurashvili

Regional Realignment and Georgia's Strategic Position

The geopolitical landscape of the South Caucasus is undergoing a significant transformation. For much of the post-Cold War period, Georgia was widely perceived in Western capitals as the region's primary partner and the principal gateway for Euro-Atlantic engagement in the South Caucasus. Today, however, the regional balance is becoming more complex. Shifting geopolitical priorities, evolving connectivity projects, and changing domestic political trajectories are contributing to a gradual redistribution of international attention across the region.

A central feature of this realignment is the changing distribution of Western political attention and engagement. For much of the past two decades, Georgia occupied a privileged position within Western policy toward the South Caucasus. Its Euro-Atlantic aspirations, reform agenda, and role as a key transit state made it the primary interlocutor for both the European Union and the United States.

Today, that dynamic is evolving. Domestic political developments in Georgia, including concerns over democratic backsliding, political polarization, and deteriorating relations with Western partners,

have complicated the country's position within Euro-Atlantic policy frameworks. While Georgia remains strategically important, it no longer enjoys the same degree of political goodwill that characterized much of the previous two decades. Increasing tensions with both Brussels and Washington have reduced Georgia's attractiveness as the region's uncontested success story and encouraged policymakers to devote greater attention to other regional actors.

At the same time, Armenia has become increasingly attractive to Western policymakers. Yerevan's efforts to diversify its foreign policy partnerships, reduce its dependence on Russia, and deepen engagement with both the European Union and the United States have created new opportunities for cooperation. The Armenia-Azerbaijan normalization process, combined with growing interest in regional connectivity initiatives such as the Middle Corridor and the Trump Route for International Peace and Prosperity (TRIPP), has further elevated Armenia's profile among Western actors. As a result, international engagement that was once heavily concentrated on Georgia is becoming more evenly distributed across the region.

This does not imply that Georgia has become strategically less important. Rather, it suggests that a distinction must be made between strategic importance and political attractiveness. While Georgia's standing with Western partners has become more complicated, its geographic position and broader security significance remain largely unchanged.

Indeed, Georgia remains indispensable from both a connectivity and security perspective. The country occupies a unique geographic position linking the Black Sea to the South Caucasus and hosts critical infrastructure connecting Europe with the Caspian region and Central Asia. Key segments of the Middle Corridor, as well as energy infrastructure such as the Southern Gas Corridor and the Baku–Tbilisi–Ceyhan pipeline, continue to run through Georgian territory, reinforcing its importance for European energy security and regional connectivity. Even as initiatives such as TRIPP seek to strengthen the role of Armenia and Azerbaijan within emerging Eurasian transit networks, Georgia remains a critical component of the broader connectivity architecture linking Europe with the South Caucasus and Central Asia.

Georgia's strategic relevance is further reinforced by Russia's continued efforts to consolidate its military presence in the occupied territories of Abkhazia and South Ossetia. While Russia maintains military forces elsewhere in the South Caucasus, Georgia remains unique in that Moscow's military presence is located on territories internationally recognized as part of Georgia. The planned expansion of the naval facility in Ochamchire

is particularly noteworthy in this regard. Beyond its local significance, the project reflects Russia's broader effort to strengthen its position along the eastern Black Sea coast and preserve its capacity for regional power projection.

As the security environment around the Black Sea continues to evolve, enhanced Russian military infrastructure in occupied Abkhazia could increase pressure on regional maritime security, reinforce Moscow's influence across the wider Black Sea region, and further complicate Georgia's security environment. The significance of Ochamchire has become even more apparent as Russia seeks to adapt its military posture following setbacks elsewhere and maintain strategic depth across the Black Sea and adjacent regions. These developments underscore that Georgia's importance extends beyond its role as a transit state; it remains a critical component of the broader security architecture linking the South Caucasus and the Black Sea.

The result is a growing divergence between political visibility and strategic importance. While Armenia and Azerbaijan are increasingly attracting international attention due to normalization efforts, emerging connectivity opportunities, and renewed external engagement, Georgia continues to occupy a central position in the region's security architecture. The challenge for Western policymakers is therefore not whether to engage Armenia and Azerbaijan more actively, but how to do so without overlooking Georgia's continuing relevance to Black Sea security, regional resilience, and the long-term balance of power in the South Caucasus.



Panoramic view of Tbilisi, Georgia after sunset



Rauf Mirgadirov

The South Caucasus: Dependence on the Outcomes of the Wars and the Role of the European Union

For the countries of the South Caucasus, the outcome of the war in Ukraine remains the key factor. If Russia manages to present the results of this war as its victory — both to its domestic audience and to the international community — and achieves legal formalization from the point of view of international law, this will radically change the balance of power in the region. In such a case, there is a high probability that the states of the South Caucasus will be forced to adapt to a new reality oriented towards Moscow. The political elites of these countries may begin to compete for loyalty to the Russian leadership, which will lead to a further reduction in their foreign-policy autonomy. In the opposite case, the paths with Russia have long since diverged — even despite such subjective factors as Ivanishvili in Georgia.

The Iranian Crisis and the Middle East

The situation in the Middle East, particularly around Iran, will also have a significant impact on regional processes. Much will depend on the scenario of developments. If the United States limits itself to a military operation without changing Iran's territorial integrity, no serious geopolitical transformations are likely to occur. However, even in this case, humanitarian consequences are possible, including refugee flows that will affect neighboring countries, including the South Caucasus. Much more serious consequences could arise in the event of a scenario of Iran's disintegration — whether through federalization or the break-up into several states. This variant, however, is not the most probable.

The Role of the European Union

As for the European Union, in its current configuration it plays a rather auxiliary role. In conditions of crisis, military-political resources are of decisive importance, and in this sphere the EU is not yet an independent player.

Europe is capable of providing political and financial support, but its influence on the strategic development of conflicts remains limited. In this sense, the EU often finds itself in the position of an observer rather than an architect of processes.

Contemporary international processes are characterized by a high degree of uncertainty and interconnectedness. The outcome of the war in Ukraine, the development of the situation around Iran, and Europe's ability to carry out institutional transformation will determine the geopolitical configuration in the coming decades.



EUMA monitors looking at Azerbaijan's military checkpoint on the Lachin corridor



Hayk Khalatyan

Scenarios for the Development of Armenia–Azerbaijan Relations from an Armenian perspective

There are many serious doubts about the successful completion of the negotiation process between Armenia and Azerbaijan in its current format, given the official approach of Baku. In particular, the active promotion of the so-called ‘Western Azerbaijan’ project even after the Washington agreements of August last year, the increase in military spending despite Armenia’s reduction of its military budget, the continued detention of Armenian prisoners of war, not only the refusal to withdraw troops from the occupied territories of the Republic of Armenia, but also the seizure of new positions last year — information about which the Armenian society learned only from opposition politicians and journalists.

To this must be added the fact that, as a precondition for a peace treaty, Ilham Aliyev demands a change to the Constitution of Armenia. This will be extremely difficult to achieve, even from a purely technical standpoint, given the low approval ratings of Nikol Pashinyan and the ruling party. It is no coincidence that the 2026 annual threat assessment by the US intelligence community notes that the outcome of the constitutional referendum is not guaranteed.

The United States and the EU must understand that long-term and stable peace cannot be achieved through unilateral, heavy, and sometimes humiliating concessions by one side alone. All this will lead to a situation in which Armenia, in order to preserve its sovereignty and security, will be forced to seek a way out of the current format. This is because Azerbaijan, with the support of Turkey, is currently trying to achieve the complete neutralization of the Armenian factor in the region. In the eyes of Armenian society, the West will effectively become a participant in these plans if it does not change its approach to the region — especially since, in implementing this policy, the US, and above all the EU, are having to renounce their own principles and values. Their policy in the region is viewed exclusively through the prism of confrontation with Russia.

In general, the EU and the United States should stop treating Armenia merely as a tool in the fight against Russia and Iran, because this creates serious problems for the country in the spheres of security and the economy. Armenia and the countries of the region can become a bridge between different centers of power — something that would serve the interests of all actors, especially in the event of the conclusion of the Ukrainian conflict.



Agreement „On the Establishment of Peace and Interstate Relations between the Republic of Armenia and the Republic of Azerbaijan”– 8 August 2025

Recommendations



Jakob Hedenskog

Poland, the EU and NATO should treat the Eastern Flank, the Western Balkans and the Ukrainian neighborhood as interconnected security scenes rather than separate problems. This means supporting crisis management, political dialogue and building partnership capacities in places where instability could spill over into NATO territory. For NATO, the key is to maintain a focus on collective defense while maintaining sufficient crisis management capabilities to support stabilization where military tools can create space for political settlement. For the EU, the priority is to make the Strategic Compass and enlargement policy tools enhance security rather than compete with it.

The increasingly uncertain world situation increases the need to rely on early warnings. Early indicators to watch include a surge in Russian military activity in Ukraine and signs of a Russian mobilization. The increasing shutdown of Internet service in Russia is not occurring in a vacuum. New revenues from the increased oil price resulting from the war in the Middle East could provide new opportunities. Putin has long-term goals but is also opportunistic.

The war in the Middle East has temporarily reduced the US attention to other theaters in the world, including its interest in negotiations to resolve the conflict between Russia and Ukraine. President Trump's unpredictability reached new levels with the attack on Iran. The war began seemingly without clear goals, without an exit strategy, and without any consideration of the risk of Iran blocking the Strait of Hormuz.



U.S. and Georgian forces during Agile Spirit 2023 exercise



Elene Kintsurashvili

For the European Union and NATO, the central challenge is strategic coherence. Although both organizations have become more engaged in the South Caucasus in recent years, their approach remains largely reactive and fragmented. The absence of a clearly articulated, long-term vision creates space for other actors to shape the region's trajectory and limits the effectiveness of Western engagement.

A more integrated approach is needed—one that recognizes the interdependence between regional stability, connectivity, energy security, and geopolitical competition. Such an approach should prioritize three closely interconnected objectives: supporting regional stabilization, particularly through the Armenia–Azerbaijan normalization process; strengthening resilience against hybrid and geopolitical pressures, including cyber threats, disinformation, infrastructure vulnerabilities, and sanctions evasion; and improving escalation-risk management through closer monitoring of corridor-related tensions and growing competition among external powers.

These priorities are becoming increasingly urgent as a growing number of actors (including Russia, Türkiye, Iran, China, and the Gulf states) seek to expand their influence through economic, political, security, and infrastructure initiatives. In the absence of a clear and coordinated Western strategy, the region risks becoming shaped primarily by external actors whose interests do not necessarily align with those of Europe and the transatlantic community.

Poland has traditionally supported closer engagement with the EU's Eastern neighborhood and may continue to contribute to discussions on the South Caucasus within European and transatlantic forums. While its ability to shape developments in the region remains limited, Poland can help ensure that the South Caucasus remains part of broader policy conversations on security, connectivity, and regional stability. This is particularly relevant as the region becomes increasingly connected to wider debates on transport corridors, energy diversification, and Black Sea security. As geopolitical and economic dynamics continue to evolve, developments in the South Caucasus are likely to remain relevant to the broader European strategic environment.

Poland is particularly well positioned to contribute to this effort. As a strong advocate for a more ambitious Eastern policy within both the European Union and NATO, Poland can play an important role in promoting a more consistent and structured approach toward the South Caucasus. This is not simply a matter of supporting regional partners; it is increasingly a question of safeguarding broader European interests. The region's role in energy diversification, emerging transport corridors, and Black Sea security makes its future directly relevant to European resilience and stability. Ensuring that the South Caucasus remains integrated into a wider Euro-Atlantic strategic vision should therefore be viewed as an investment in the long-term security of Europe itself.



Maciej Mielnik

From a policy perspective, a more effective Western approach should integrate the South Caucasus more clearly into broader thinking on Europe's neighborhood security. This means treating the region not only as a space of recurring crises, but also as a strategic environment in which local conflicts, external power competition, connectivity, energy security, and hybrid pressure increasingly intersect.

For the EU and NATO, resilience should remain a central priority. Particular attention should be paid to the protection of critical infrastructure, the security of transport corridors, the vulnerability of energy routes, and preparedness for hybrid pressure. European governments also need a more differentiated understanding of the region, including the interaction between local agency, external power competition, and wider Middle Eastern dynamics.

Poland and other Eastern-Flank states can contribute to a more joined-up Euro-Atlantic approach by linking deterrence, resilience, connectivity security, and sustained political engagement. Their perspective is particularly relevant because instability in the South Caucasus increasingly affects the wider security environment of NATO's Eastern Flank.

Looking ahead over the next 12–24 months, policymakers should monitor not only acute military escalation, but also early indicators of systemic stress. This includes changes in the security of energy and transport corridors, intensified hybrid activity, new forms of regional power projection, and signs that the South Caucasus is being drawn more deeply into a wider arc of instability. The broader lesson is that the link between the Middle East and the South Caucasus is no longer a secondary or theoretical question. It has become a strategic planning issue for Europe, NATO's Eastern Flank, and countries such as Poland.

Finally, effective policy towards the South Caucasus cannot be designed solely from a distance or through broad geopolitical categories. It requires field-based expertise, sustained engagement with the region, and a nuanced understanding of local political, social, and cultural dynamics. Such context-sensitive analysis is essential for assessing the motivations and threat perceptions of regional actors and for ensuring that policy responses are realistic, targeted, and effective.



Borderization of ABL (Administrative Boundry Line) at Khurvaleti village, near South Ossetia



Marcin Popławski

From the perspective of the European Union, NATO, and Poland, the evolving situation in the South Caucasus offers a strategic opportunity to advance regional stabilization, reduce escalation risks, and strengthen resilience against hybrid and geopolitical pressure. This is particularly relevant in the context of the potential domino effect linking security developments in the South Caucasus, the Black Sea, and NATO's eastern flank.

For Poland – as a country on NATO's eastern flank and one of the most active advocates of deeper EU engagement in the South Caucasus – the current moment holds particular importance. Poland is not a passive observer but an active player supporting closer Armenia–EU relations, Georgian civil society, and the Armenia–Azerbaijan normalization process. This engagement occurs against the backdrop of Russia's full-scale aggression against Ukraine, the central conflict shaping security perceptions for both Poland and the states of the South Caucasus. In this context, the following priorities should guide Polish and broader Euro-Atlantic policy: treat the South Caucasus as an integral part of a wider security continuum linking the Middle East, the Black Sea, and NATO's eastern flank, recognizing the risk of a domino effect from regional destabilization; actively support the Armenia–Azerbaijan normalization process as a key element of long-term regional stabilization and conflict prevention; strengthen resilience to hybrid threats, particularly in the areas of disinformation and cybersecurity; increase engagement in energy and transport connectivity projects (including the Middle Corridor and the Green Energy Corridor) through both political support and direct business cooperation; promote diversified international partnerships for the South Caucasus states with the United States, Turkey, Central Asia, Japan, and South Korea, thereby reducing one-sided dependencies.

A central and increasingly important element of this strategy should be the EU's new economic logic in the South Caucasus. From Brussels' perspective, supporting economic projects in the immediate neighborhood that bypass Russia is not only a matter of values but, above all, a hard strategic interest. The EU should therefore systematically: prioritize and accelerate the development of alternative transport and energy corridors (especially the Middle Corridor and Green Energy Corridor) that reduce dependence on Russian territory and infrastructure; ensure that a growing share of raw energy materials and goods transiting to Europe avoids Russian routes, thereby weakening Russia's economic leverage and military potential; redirect economic benefits and profits – previously captured by Moscow – towards the states of the South Caucasus and Central Asia, supporting their sovereignization and creating genuine developmental impulses; offer capital and technology that are less politically burdensome than offerings from Russia, China, or other rivals, while carefully monitoring and countering sanctions evasion; and view economic cooperation with Armenia, Azerbaijan, and Georgia through the dual prism of European strategic autonomy and long-term regional stability.

This economic approach, if pursued consistently, can simultaneously achieve several interconnected goals: weaken Russia's war economy, stimulate regional cooperation, reduce the risk of future conflicts, and build greater resilience to hybrid pressure. It transforms the EU from a normative actor into a pragmatic geopolitical player capable of delivering tangible benefits to the region. By integrating political, security, and economic instruments – with Poland playing an active bridging role – the EU and its member states can contribute meaningfully to a more stable, connected, and resilient South Caucasus, while strengthening the security of the entire eastern neighborhood.

About the experts



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Marcin Popławski is a Central Asia analyst at The Opportunity Institute for Foreign Affairs. He specializes in the domestic and foreign policies of Central Asian states and focuses on their economic transformations, with particular emphasis on raw materials, energy, transport, and trade. His research interests include changes in socio-cultural identities, civil society, as well as historical politics and collective memory in Eastern Europe, the Caucasus, and Central Asia.

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In April 2014, he was deported from Turkey to Azerbaijan, where he was arrested at the airport on charges of espionage in favor of Armenia. Although the verdict was upheld on appeal in March 2016, he was released on probation and has lived in Switzerland since the autumn of 2016.

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