

# Between Iran, Russia, and Türkiye: Policy Choices for Israel in the South Caucasus

**I**lham Aliyev, President of Azerbaijan, once described the relationship between his country and Israel as “like an iceberg” with most of its mass “below the surface,” invisible to the public eye. This striking metaphor appeared in a 2009 diplomatic cable, later [revealed](#) by WikiLeaks, in which Aliyev noted that “ninetenths” of the Azerbaijani-Israeli relationship remained hidden. The remark reflected a deliberate policy of discretion, particularly in sensitive sectors such as defense, intelligence, and energy, designed to avoid provoking Iran, antagonizing other regional actors, or sparking internal dissent (political Islam).

The disclosure of this cable confirmed what analysts and diplomats had long suspected: the alliance between Baku and Tel Aviv was largely clandestine, grounded in pragmatic strategic interests

rather than ideology, a careful balancing act focused on security, regional influence, and geopolitical survival. Over the past decade and a half, the iceberg has gradually emerged from the depths. Security cooperation has expanded, new sectors such as technology and energy have come into play, and Azerbaijan has emerged as Israel’s dominant partner in the South Caucasus.

## Israel’s Core Foreign-Policy Principles

Israel’s foreign policy has long been shaped by security-first pragmatism. Geography (regional isolation), demography, and the perception of existential threats from neighboring states produced a doctrine centered on proactive defense: nuclear deterrence, pre-emptive strikes, containment of hostile actors such as Iran, Hamas, or Hezbollah,



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and the prevention of strategic encirclement. To support this posture, Israel developed formidable intelligence services, cyber capabilities, advanced airpower, and high-precision missile technology.

Although Israel built a uniquely close partnership with the United States, it also recognized that dependence on a single ally was untenable. It, therefore, diversified its external relationships through arms exports, intelligence cooperation, and flexible diplomacy. Within the Middle East, where relations were often tense, Israel pursued selective integration, limited cooperation with states such as Egypt, Jordan, Saudi Arabia, and Bahrain, and discreet engagement with Kurdish and Druze factions in Iraq and Syria. When possible, Tel Aviv cultivated pragmatic ties with non-Arab or moderate Muslim-majority states, often through confidential channels (the “iceberg” model of quiet partnerships). Arms sales, intelligence sharing, energy arrangements, and back-channel diplomacy formed a dual system of visible alliances complemented by covert ties. For decades, Türkiye was Israel’s closest regional partner until Ankara’s shift under the *Justice and Development Party* (AKP) to a foreign policy aiming for leadership of the Muslim world and the use of the Palestinian issue for this matter.

While firmly anchored in the Western community, Israel has consistently sought to broaden its strategic options. Its diplomacy has been flexible, interest-driven, and rarely ideological. Security, opportunity, and leverage, rather than normative commitments to democracy or “Western values,” guided decisions in energy, defense sales, peace negotiations, and regional alignments. Israel’s relationship with post-Soviet Russia exemplifies this blend of pragmatism and hedging.

The Hamas [attack](#) of 7 October 2023 and the ensuing war in Gaza profoundly altered Israel’s strategic environment. The conflict shifted Israel’s perception of threat from localized arenas to a regional confrontation with an Iranian-led axis

spanning Lebanon, Syria, Yemen, Iraq, and the Red Sea. As a result, Israel has expanded its doctrine of pre-emptive, multi-theatre operations, striking not only Gaza but also Iran-backed networks, supply chains, and logistical hubs. The shift is from “contain and manage” to “degrade and dismantle.”

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Simultaneously, the war’s humanitarian toll and devastation in Gaza have generated intense global condemnation, damaging Israel’s international image and straining long-standing alliances. Growing criticism regarding human rights and international law has complicated relations with traditional Western partners and reduced the space for discreet cooperation with Arab or Muslim states whose governments face increasingly hostile public opinion. The resulting diplomatic constraints create new openings for actors such as today’s Georgia, but also compel Israel to rely more heavily on military tools, asymmetric operations, and intelligence rather than soft power.

Despite these shifts, core principles endure. Security-first pragmatism remains the foundation, strengthened rather than weakened by the expanded sense of threat. As Western alignment becomes more complex, Israel is likely to intensify its outreach to non-Western or emerging powers wherever strategic benefits arise. The deepening Israel-India partnership, increasingly resembling a strategic alliance, is emblematic of this evolution.

## **The South Caucasus as a Strategic Periphery**

Israel’s engagement in the South Caucasus fol-

lows the same foreign-policy logic that structures its global posture: security primacy, diversified partnerships, pragmatic diplomacy, and discreet influence. Although the region is not a core theatre for Israel, overshadowed by the Middle East, the Eastern Mediterranean, and the Gulf, it sits at the intersection of three of Israel's central strategic concerns: Iran, great-power competition (Russia-Türkiye-West), and access to energy from the Caspian basin.

As such, Israel's relations with Azerbaijan, Georgia, and Armenia are peripheral but highly functional extensions of its broader geopolitical aims, chiefly containing Iran and managing risks linked to Russia and Türkiye. Energy considerations add a further layer of importance: nearly 40% of Israel's crude oil imports [originate](#) in Azerbaijan via the Baku-Tbilisi-Ceyhan pipeline (BTC pipeline), making Baku a vital non-Arab supplier.

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The principal driver of Israel's presence in the Caucasus is Iran. The region provides one of the rare geostrategic spaces where Israel can maintain proximity to Iranian territory without direct confrontation. For decades, the South Caucasus has served as a platform for intelligence gathering, surveillance, and strategic depth, allowing Israel to monitor Iranian missile deployments, Islamic Revolutionary Guard Corps (IRGC) activity, and nuclear-related sites. This aligns perfectly with Israel's doctrine of forward defense and pre-emptive deterrence, aimed at extending strategic depth beyond its borders.

Azerbaijan holds a singular place in this archi-

ture. Long shrouded in deliberate opacity, the Azerbaijan-Israel partnership has evolved into one of Israel's most consequential security relationships outside its immediate region. It reflects Israel's traditional pattern of cultivating non-Arab, peripheral allies, akin to Cold War partnerships with Türkiye, Ethiopia, or the Shah's Iran, based on shared threat perceptions. In some respects, Azerbaijan has replaced Türkiye in this role as Ankara's neo-Ottoman turn and ambition to lead the Muslim world have made its foreign policy increasingly antagonistic with Israel's.

The partnership's sensitivity derives from Iran's perception that Azerbaijani-Israeli cooperation represents strategic encirclement. For both Baku and Tel Aviv, discretion was long a structural necessity. Yet, since the 2020 Nagorno-Karabakh war, during which Azerbaijan [deployed](#) Israeli drones (SkyStriker), much of the "iceberg" has become visible. The [opening](#) of Azerbaijan's embassy in Israel in 2023 formalized what had been implicit for decades.

Despite deepening ties, Azerbaijan cannot afford open hostility with Iran for three structural reasons. First, geography: the two states share a 765-kilometre border, making Azerbaijan uniquely exposed to immediate spillover from any crisis. Second, infrastructure vulnerability: Iran's missile arsenal could easily target Azerbaijani energy assets: refineries, the Sangachal terminal, offshore fields, the BTC pipeline, and the future Trump Route for International Peace and Prosperity (TRIPP) corridor, crippling the country's economy and European energy supplies. Third, domestic fragility: Iran retains significant leverage inside Azerbaijan through ethnic, religious, intelligence, and economic channels. It can influence border communities, shape narratives, or destabilize internal politics.

For these reasons, Baku has consistently calibrated its diplomacy: expanding cooperation with Is-

rael while ensuring Iran is neither cornered nor humiliated. When Tehran accuses Baku of harboring Israeli intelligence assets, Azerbaijan reaffirms sovereignty over its partnerships, stresses non-interference, and often initiates high-level dialogue to de-escalate. This caution is a strategic calculation, not necessarily an ideological affinity. A direct Israel-Iran large-scale confrontation would make Azerbaijan an inevitable battleground, threatening its stability, economy, and energy transit role.

## Georgia: Strategic Transit, Intelligence Concerns, and Anti-Western Drift

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Georgia is operationally relevant for Iranian intelligence. Although not a frontline arena in the Israel-Iran confrontation, it sits at a sensitive crossroads: bordering NATO-member Türkiye and Iranian partner Armenia, hosting key energy corridors such as BTC and the Trans-Anatolian Natural Gas Pipeline (TANAP), and maintaining relatively open entry policies that have, at times, facilitated access for Iranian nationals. For Israeli ser-

vices, this makes Georgia a potential transit hub for Iranian operatives, a platform for monitoring Israeli-linked activity, and, in extreme scenarios, a soft target for attacks against Israeli citizens. The [defused](#) 2012 car bomb intended for an Israeli embassy vehicle in Tbilisi remains a defining episode, reinforcing Israel's belief that Iran or its proxies are willing and able to act in Georgia.

Israel also views Iran-Georgia economic and diplomatic ties with caution. Georgia's engagement with Iran has historically been pragmatic, motivated by trade, tourism, and investment, and not ideological. Yet, from an Israeli perspective, Iranian commercial networks may mask IRGC-affiliated fronts, and tourism flows can offer cover for intelligence activity. Georgia has periodically tightened visa and oversight regimes, but vulnerabilities persist.

These concerns intersect with another issue: Georgia's geographic position between Azerbaijan, Israel's main partner in the region, and Türkiye, a critical logistical route. Iranian intelligence activity in Georgia could therefore enable observation of Israeli-Azerbaijani cooperation, including cargo transfers or personnel movements. For Israel, Iranian eyes in Georgia may imply surveillance of the entire Israel-Azerbaijan corridor.

Israel's unease has sharpened in recent years as Iranian influence in Georgia has grown while Western leverage has receded. Symbolic moments have intensified this perception. The [attendance](#) of Georgia's top leadership at Iranian President Ebrahim Raisi's funeral in 2024, alongside figures from Hamas and Hezbollah, prompted public [dis-](#)  
[may](#) from the Israeli embassy. A similar [reaction](#) followed in 2025 when a Georgian deputy foreign minister participated in an Iranian embassy "solidarity" event, criticizing Israel. Yet, Israel avoided escalation, treating these gestures as troubling but not transformative.

Shortly afterward, the [visit](#) of Israel's National Security Minister to Tbilisi and the Georgian Minister of Interior to Israel [underscored](#) continued cooperation, even as Israeli media highlighted Georgia's "delicate balancing act" between outreach to Iran and ties with Israel. For Israel, the risk is that deeper Iranian penetration could compromise Georgia's reliability as a strategic transit corridor and expand the space for Iranian intelligence near Israel's periphery.

## Armenia and the TRIPP Opportunity

Israel's relations with Armenia have long been constrained by geopolitical realities, above all the Armenia-Azerbaijan conflict and Israel's strategic priorities in the region. These factors have limited the depth, reliability, and even the relevance of the bilateral partnership.

The foundations of this divergence were laid at the Soviet Union's collapse and the onset of the first Nagorno-Karabakh war. Iran sided with Armenia against Azerbaijan, a state Tehran distrusted for its perceived irredentist ambitions, encouraged by Türkiye and the symbolic prospect of unifying "the two Azerbaijanians." Armenia, blockaded by Türkiye and Azerbaijan and lacking a direct border with Russia, seized the opportunity offered by Iran. Tehran enabled Yerevan to break isolation, secure supply routes, and receive Russian weapons at a time when Georgia, Armenia's only other potential outlet, was mired in civil conflict.

Israel entered the region once these alignments were already in place. Seeking an observation point on Iran, it gravitated toward Azerbaijan, whose own threat perceptions vis-à-vis Tehran aligned with Israel's. Azerbaijan also offered advantages over Georgia, which, despite historically warm attitudes toward Jews and Israel, had no border with Iran and faced chronic vulnerability to Russian military pressure. Israel considered this

a strategic risk. Thus, for more than two decades, Armenia and Israel evolved along opposing, or at best parallel, diplomatic tracks.

Armenia's strategic partnership with Iran is not an immediate security threat to Israel, but it complicates Tel Aviv's regional calculus. Israel views Iran's presence in the South Caucasus through the prism of Tehran's broader ambitions, its nuclear program, and its proxy networks. In this context, Armenia's reliance on Iran for trade corridors and energy links gives Tehran an indirect platform in a sensitive space bordering Israel's closest regional partner, Azerbaijan. Yet Yerevan's alignment is driven far more by structural isolation than by ideology. For Israel, Armenia thus appears more as an enabler of Iranian influence than a deliberate ally of Tehran.

Still, from Yerevan's point of view, the chronically low level of Armenia-Israel ties is rooted less in Iran than in Israel's enduring strategic partnership with Azerbaijan and the geopolitical realities of the Nagorno-Karabakh conflict. Armenia's [recognition](#) of the State of Palestine in 2024 triggered Israeli criticism, but Yerevan justified the move as a response to Israel's arms supplies to Azerbaijan during the 2020 and 2023 conflicts. Diplomatic relations were briefly downgraded, with Armenia [recalling](#) its ambassador in 2020.

The August 2025 U.S.-mediated Armenia-Azerbaijan agreement [creating](#) the TRIPP corridor—linking Azerbaijan to Nakhchivan through Armenian territory—marks a potential turning point. Designed to normalize relations and reshape regional connectivity while bypassing Iran, TRIPP could become a catalyst for recalibrating regional alignments. If Armenia transforms itself into a stable transit hub rather than a geopolitical outlier, Israel may find it easier to pursue economic, diplomatic, or technical engagement without undermining its partnership with Baku, particularly once a peace treaty is in place.

Participation in TRIPP under U.S. auspices also signals Armenia's tentative pivot away from Russia. This shift aligns with Israel's interest in reducing Moscow and Tehran's influence in the South Caucasus. Should Armenia leverage TRIPP to attract Western investment, it could evolve at least into a neutral actor open to diversified partnerships, including with Israel.

Yet, the path remains fraught. An American-supervised transit route through Armenia will likely provoke hostility from Russia and Iran, which could deter rapid or visible Israeli engagement.

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Nonetheless, TRIPP represents a remarkable geopolitical gamble, one that could [reshape](#) connectivity, diminish Russian and Iranian leverage, and offer Israel a rare opportunity to re-engage Armenia on pragmatic, economically driven terms. It is no coincidence that Armenia and Israel [held](#) their first round of political consultations in years in Yerevan on 26 November 2025, signaling a deliberate effort to revive the bilateral relationship in the wake of the 8 August White House [declaration](#) by Nikol Pashinyan and Ilham Aliyev.

## Hedging Strategies: Navigating Russia, Compartmentalizing Türkiye, and Prioritizing Azerbaijan

As we mentioned earlier, the Caucasus sits at an intersection of overlapping hegemonies. For Israel, this makes the region not only strategically useful

but diplomatically delicate. Navigating these pressures requires the hedging instincts that have long characterized its diplomacy.

For years, Israel sought to minimize friction with Moscow in the Caucasus, preserving a diplomatic balance that safeguarded critical channels in the Middle East, above all in Syria, Lebanon, and vis-à-vis Iran. The relationship between Israel and Russia over the past decade rested on a tension between pragmatic security coordination and widening geopolitical divergence. What had once been a workable equilibrium gradually eroded under the weight of overlapping crises: Russia's war in Ukraine, shifting regional alignments, and the 2023 Hamas-Israel war. Although ties have deteriorated, several structural factors still sustain a minimal *modus vivendi*.

After Russia's 2015 [intervention](#) in Syria, both countries established a de-confliction mechanism that became the backbone of their tacit security cooperation. It enabled Israel to strike Iranian-linked assets across Syria while avoiding direct confrontation with Russian forces. Scholars have described this period as one of "friendship balancing," in which both sides managed interests and rivalries through elite contacts rather than overt alignment. Social and demographic links, especially Israel's large Russian-speaking community, further underpinned this cautious accommodation.

Despite divergent strategic orientations, Israel firmly in the Western orbit, and Russia retrenching from it, the two states maintained a pragmatic understanding: limited cooperation, managed competition, and an acknowledgment that each would pursue its own priorities.

The Russian invasion of Ukraine in February 2022 marked a turning point. Israel refrained from joining Western sanctions, yet the war altered Moscow's perception of Israel as a manageable partner. Russia's deepening confrontation with the West

pushed it closer to Middle Eastern and non-Western actors, often hostile to Israel. As Moscow strengthened ties with Iran, long viewed by Israel as an existential threat, the previous equilibrium became harder to sustain.

The rupture came with the Hamas attack of 7 October 2023 and Israel's subsequent campaign in Gaza. Russia [condemned](#) Israel's military actions and called for an immediate ceasefire, abandoning its earlier posture of relative restraint. Israel [responded](#) sharply, summoning the Russian ambassador after Moscow hosted a Hamas delegation and criticizing Russia's alignment with Iran. Some analysts [described](#) bilateral ties as reaching "their lowest point since the fall of the Soviet Union." Yet, despite public acrimony, neither side opted for a full diplomatic break. Structural constraints, demographic linkages, and pragmatic calculations preserved a minimal channel of communication. Moscow also continued to value Israel as a potential conduit to the West.

The collapse of the Assad regime in late 2024 and Russia's diminished operational footprint in Syria significantly expanded Israel's freedom of action. Even more consequential has been the consolidation of the Russia-Iran partnership: Tehran's provision of drones, missiles, and military technology for Russia's war effort in Ukraine now anchors a structural alignment directly opposed to Israeli interests.

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These changes reduce Israel's incentive for strategic restraint. While Tel Aviv will avoid gratuitous confrontation with Moscow, Russia is no

longer the pivotal actor whose sensitivities Israel must systematically accommodate. The balance of power in Syria and across the Middle East-Eurasia nexus has shifted in ways that render Russia's preferences far less central to Israeli strategy.

This new context has enabled Israel to recalibrate its posture in the South Caucasus. First, it can now deepen its partnership with Azerbaijan without fearing Russian retaliation. In earlier years, Israel moderated the visibility of this cooperation; today, Russia's preoccupation with Ukraine limits its ability to penalize closer Israeli-Azerbaijani ties, while Baku's value as a counterweight to Iran has grown.

Second, Russia's weakness has opened space for limited engagement with Armenia. Long embedded in Moscow's security system and reliant on Iran, Armenia had been effectively off-limits. Its recent westward pivot, accelerated by its embrace of the TRIPP corridor and disillusionment with Russia's failure to defend Armenian interests, now permits Israel to explore technocratic and economic cooperation with Yerevan, more feasible than at any time since the early 1990s.

Third, Israel's interests increasingly align with Western efforts to reshape the South Caucasus, counter the Russia-Iran axis, and reduce Tehran's influence over Armenia. Georgia remains an exception: Western influence has declined while Russia has gained ground. The prospect of Russian control over key transit routes, including hydrocarbon corridors such as the BTC pipeline, is a concern for Israel and the West. Still, Israel will maintain political and economic links with Georgia, albeit at a lower level than with Azerbaijan. The Georgian government remains receptive to Israeli investment in technology and cyber cooperation (for homeland security and political surveillance of opponents), even if defense is not a priority for its Moscow-leaning leadership.

## Accepting the Türkiye-Azerbaijan Alliance

Israeli strategies in the South Caucasus coexist with Ankara's expanding presence in Azerbaijan and its ambition to shape regional transport corridors. Israel neither challenges Türkiye's role nor subordinates itself to it: it adapts, exploiting complementarities in Baku and avoiding entanglement where interests diverge. Even if Türkiye adopts more confrontational rhetoric against Israel, Baku does not relay that hostility. On the contrary, Azerbaijan deliberately keeps its partnerships compartmentalized: on the one hand, it pursues deep security cooperation with Israel (intelligence, UAVs, energy), and on the other, it maintains a strategic, identity-based alliance with Türkiye (military integration, political solidarity). Because Azerbaijan separates these tracks, Israel trusts that Ankara cannot easily instrumentalize Baku against Israeli interests.

Both Baku and Tel Aviv believe that Azerbaijan acts as a moderating buffer, not a conduit for Turkish hostility. Israel sees Azerbaijan as more pragmatic, more secular, more non-ideological, and more stable in its foreign policy than Türkiye.

Azerbaijan's simultaneous [management](#) of a deep strategic partnership with Türkiye, a discreet but extensive security relationship with Israel, and a non-confrontational posture toward Iran is one of the most delicate balancing acts in its foreign policy.

Even when Turkish-Israeli relations soured sharply after 2010, and again after 2023, Ankara never forced Baku to downgrade ties with Tel Aviv. Instead, a tacit strategic division of labor has emerged between the two Turkic states: Türkiye benefits indirectly from Israeli intelligence and technology that Azerbaijan acquires and employs in ways broadly compatible with Ankara's regional

aims. This arrangement allows Turkish leaders to sustain a public posture critical of Israel over the Palestinian issue while preserving *de facto* operational channels.

Ankara generally respects the strategic value of an autonomous, interest-driven Azerbaijani foreign policy and avoids pushing Baku into unwanted choices. Baku sometimes returns the courtesy with diplomatic gestures toward Ankara; for example, by so far refraining from joining the [Abraham Accords](#). Israel, for its part, does not regard the Turkish-Azerbaijani axis as a decisive risk.

Many in Israel view Turkish hostility as primarily political rather than structural. Throughout periods of intense diplomatic friction, the two countries have maintained working intelligence links, NATO frameworks for cooperation, and airspace deconfliction. A considerable trade relationship persisted until recently (May 2024) when Turkish authorities officially [halted](#) import-export transactions with Israel.

Several factors limit the likelihood of direct military confrontation (a non-direct clash has already happened in Syria in April when Israel [destroyed](#) military bases in Hama and Homs). Türkiye and Israel share, albeit for different reasons, strategic concern about Iranian regional behavior; Azerbaijan, facing Iran on its southern border, shares elements of that threat perception. This overlapping suspicion produces implicit alignment and mitigates perceived risks within the Türkiye-Azerbaijan bloc. Moreover, Turkish-Azerbaijani military integration indirectly benefits Israel: Azerbaijan's battlefield successes, reliant in part on Israeli drones, missiles, and ISR systems, validate Israeli defense technology and do not contravene Ankara's interests.

Crucially, Israel values Azerbaijan highly as a major hydrocarbon supplier (more than 40% of Israel's crude oil), a rare friendly Muslim-majority

state with open intelligence links, and a strategic foothold near Iran and the Caspian corridor. Israel, therefore, treats Azerbaijan as an independent strategic actor, not a Turkish proxy.

## New Phase

Israel's position in the South Caucasus is entering a new phase. The collapse of old strategic equilibria, Russia's reduced leverage in Syria, Ankara's sharper anti-Israeli posture, Iran's growing assertiveness, and Georgia's drift from the West have transformed what was once a peripheral arena into a key vector of Israel's security strategy. Baku remains Israel's anchor, but Azerbaijan's delicate balancing vis-à-vis Iran and Türkiye highlights the need for broader diversification. Armenia's tentative Western pivot, especially through frameworks like TRIPP, creates new opportunities for Israel to support regional connectivity, thereby weakening Iranian and Russian leverage.

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Israel's task now is to move from quiet, security-driven engagement to a more deliberate regional strategy: supporting Western presence, protecting energy and transit routes, encouraging plural alignments, and preventing Tehran and Moscow from shaping the region's future architecture. In a rapidly shifting Eurasian landscape, the South Caucasus is becoming a strategic hinge for Israel's long-term security and geopolitical resilience ■