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The Trial



THE TRIAL



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Our Mission

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We, at *GEOpolitics*, believe that disseminating knowledge and analysis conducted with integrity and impartiality can advance national interests and strengthen democratic institutions in Georgia and across the broader region. Our journal fosters a culture of intellectual exchange, encouraging meaningful contributions to the wider geopolitical discourse, with particular attention to Georgia and the South Caucasus.

In line with our ethos, the journal is firmly committed to promoting Georgia's European and Euro-Atlantic integration and democratization, while also engaging with political and security developments across the wider region. *GEOpolitics* reflects the Georgian people's strategic orientation toward the Western world, democracy, and Europeanization. Our vision is that Georgia can and must contribute to universal democratic values and to strengthening regional and international security through analytical and intellectual engagement.

We have assembled a team of experts and contributors with strong policy experience who enrich the debate on Georgia's foreign and security policy, while examining broader dynamics in the South Caucasus. We analyze Georgia's relations with the EU, NATO, Russia, and other key geopolitical actors and institutions, and assess how internal developments shape Georgia's geopolitical role, fostering informed dialogue from, about, and in Georgia and the broader region.



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Democracy on Trial in Georgia as Kafkaesque Dictatorship Has All But Arrived

Georgia and its courtrooms - criminalizing politicians, activists, CSO leaders, and journalists - increasingly resemble Franz Kafka's courtroom: a space where hearings proceed with formal precision but without morality; where accusation substitutes for evidence; where institutions function and follow the letter of the law, yet the law itself has lost moral standing and commonsense logic; where the judges, prosecutors and court marshalls know the verdict before even the trial starts. As the country awaits a new batch of draconian measures in early March, political and civic life is shrinking toward paralysis. To analyze, to publish, to criticize, to argue — these ordinary acts of democratic existence are steadily recast as punishable behavior. And, as in Kafka's *The Trial*, Georgians find themselves trapped in a condition where legality replaces justice, fear displaces debate, and civic participation itself begins to resemble a criminal act.

On top of it, regional geopolitics offer little relief. The West, and particularly the United States, approaches Georgia not as a moral cause but as a file within a broader strategic ledger: Ukraine, Iran, China, energy corridors, elections at home. Guided by interests and constrained by competing priorities, Washington and key European capitals hesitate to escalate pressure on a dictatorship in the making. Sanctions are discussed, statements are issued, concerns are voiced, yet the cost imposed remains carefully calibrated, reversible, and manageable. Between these two

suspended realities — domestic repression and external hesitation — Georgia is drifting closer to a full-fledged one-party dictatorship.

This issue of *GEOpolitics* cannot ignore the changing legal environment in Georgia, which also poses serious risks for the authors and contributors of our journal. Nonetheless, in this and subsequent issues, *GEOpolitics* will continue to provide detailed analysis of Georgian and regional politics, to document the transformation of institutions as it unfolds, and to examine how domestic authoritarian consolidation intersects with wider geopolitical shifts in the South Caucasus and beyond, especially after tectonic developments in Iran and the Middle East. Silence would be safer, and selective commentary would be more convenient. But at this moment, the responsibility of an independent journal is not to retreat but to remain precise, evidence-based, and intellectually honest. If the public space is shrinking, the task is to use what remains of it carefully and rigorously.

Vano Chkhikvadze opens the issue by examining how Georgia's legal framework is being reshaped to constrain and ultimately suffocate independent civic life. He argues that the Georgian Dream's March 2026 amendments to the Law on Grants and the Criminal Code represent the culmination of a deliberate, multi-year strategy to dismantle Georgia's independent civic sphere and consolidate authoritarian rule under a legal façade. These changes will inevitably lead to the systemic suffocation of NGOs, media, watch-

dogs, and advocacy groups, and to the monopolization of policy evaluation in the hands of the state. Coupled with new provisions penalizing “non-recognition” of state legitimacy, the legal overhaul seeks to eradicate dissent, isolate Georgia from the Western democratic community, and entrench a one-party system under the guise of law. Chkhikvadze concludes that unless met with decisive domestic or international intervention, Georgia’s pluralistic order will be replaced with a state-controlled political reality sustained by repression and external indifference.

Sergi Kapanadze continues with the analysis of a rare geopolitical opening in the South Caucasus — marked by Armenia–Azerbaijan normalization, Russia’s weakening influence, and renewed Western investment through initiatives such as the Middle Corridor and TRIPP — only to be undermined by Georgia’s internal authoritarian drift under Bidzina Ivanishvili. The article rejects the “strongman fallacy” that it is easier to negotiate with dictators, arguing that Mr. Ivanishvili’s pattern of broken alliances, erratic foreign policy, personal reclusiveness, and deteriorating relations with Washington demonstrates that personalist authority produces volatility rather than reliability. The conclusion is that Western connectivity and security interests cannot be separated from Georgia’s democratic trajectory, and that coordinated conditionality — centered on refusing party bans, repealing repressive laws, releasing political prisoners, and reforming the electoral code — is essential if Georgia is to remain a credible transit partner rather than a geopolitical liability at the Black Sea hinge.

Thornike Gordadze widens the scope of analysis by arguing that Iran’s uncertain trajectory after the decapitation of the ruling regime by the U.S. and Israel could upend the fragile geopolitical balance of the South Caucasus. As Iran struggles with the consequences of the devastating U.S.–Israeli strikes and a leadership vacuum, three outcomes are outlined: an orderly, pragmatic tran-

sition that would weaken Russia’s leverage and stabilize regional connectivity; a chaotic collapse that would generate refugee flows, corridor disruption, and opportunistic intervention by Moscow and Ankara; or a hardened authoritarian successor that entrenches bloc politics and sanctions-driven rivalries. For Georgia, Iran acts as a force multiplier: a democratic Iran could reopen Western pathways and reduce grey-zone vulnerabilities; instability would spill northward, with security and economic costs; while a securitized Iranian regime would deepen authoritarian connectivity formats and heighten Western scrutiny of Tbilisi. Gordadze concludes that West’s Iran policy cannot be compartmentalized, as decisions taken in Washington or Brussels will directly shape Eurasian transit corridors, Russia’s war economy, and the already fragile balance of the South Caucasus.

Temuri Yakobashvili’s analysis situates these regional dynamics within a broader structural transformation of the international order. The liberal consensus that followed the Cold War has given way to a world of structured multipolarity, transactional alliances, economic nationalism, and minilateral coalitions. But now, the universalist rhetoric is receding, and sovereignty and interest-driven calculations are reasserting themselves. For middle powers, this environment offers opportunities to hedge and maneuver, while for small states, it narrows the margin for strategic experimentation. Yakobashvili argues that Georgia cannot afford the illusion of autonomy characteristic of larger actors. In a system increasingly defined by conditional engagement and bloc competition, small states must anchor themselves firmly or risk drifting into dependency and loss of sovereignty.

Shota Gvineria shifts the focus from regional connectivity and Iran’s ripple effects to the core security architecture underpinning Europe’s periphery — NATO’s credibility. Although Article 5 remains legally intact, deterrence ultimately rests

on perception, and debates about conditionality, strategic autonomy, and U.S. recalibration risk creating ambiguity around what was long seen as an automatic collective defence guarantee. For frontline and aspirant states in the Black Sea and South Caucasus (Georgia, Ukraine, and Moldova), this is not an abstract discussion but an existential one: NATO has symbolized protection and an escape from Russia's sphere of influence. Gvineria contends that if belief in the unconditional nature of Article 5 weakens, adversaries may probe, allies may hedge, and reform incentives in peripheral states may erode. The future stability of Europe's periphery, he concludes, depends less on rhetoric and more on whether NATO can sustain strategic clarity and political unity strong enough to preserve the credibility that has deterred Russian aggression for decades.

Ghia Nodia moves from questions of NATO credibility and geopolitical volatility to a deeper reflection on whether "the West" itself is in crisis, and what that means for a country like Georgia that has defined its modern identity through Western alignment. He argues that since the late 1980s, the West has served as Georgia's strategic compass. Yet under Donald Trump's more transactional and nationalist approach, alongside the broader rise of populism and internal Western self-doubt, the West's cohesion and normative confidence appear shaken. Nodia cautions, however, against declaring its death: previous waves of decline proved premature, and today's turbulence may reflect not collapse but painful redefinition after the overreach and illusions of the post-Cold War "liberal international order." While Trump's rhetoric and policy shifts have strained transatlantic solidarity and unsettled assumptions about Western leadership, official U.S. doctrine still distinguishes Europe as a "like-minded" partner, suggesting recalibration rather than abandonment. For Georgia, therefore, the central dilemma is not whether the West still exists, but

whether Georgia, amid authoritarian backsliding and political polarization, can credibly remain part of that community of like-minded states.

Finally, Jaba Devdariani and Tornike Zurabashvili close the issue with a counterfactual analysis of how Georgia could have acted after Russia's full-scale invasion of Ukraine. They contend that a more pro-Western government could have maintained strategic caution without sliding into anti-Kyiv rhetoric and de facto alignment with Moscow. Instead of weaponizing fear and refusing sanctions, such a government could have expanded humanitarian support, tightened sanctions enforcement, strengthened diplomatic engagement, enhanced defensive capabilities, and used the moment to rebuild Western trust and regional partnerships. The authors conclude that Georgia's stance after 2022 was not structurally predetermined but reflected deliberate political decisions that squandered a rare opportunity to consolidate national unity, reinforce resilience, and anchor the country more firmly within the Euro-Atlantic community.

This issue of *GEOpolitics* thus examines a country undergoing trial on multiple levels: by its own institutions, by its regional environment, by the transformation of the world order, and by the standards of the community it seeks to join. The most unsettling aspect of Kafka's narrative was not the severity of the sentence, but the quiet acceptance of the process without questioning its legitimacy. The challenge facing Georgia today is not merely to endure the trial, but to decide whether it will remain seated beneath the gavel, or reclaim the authority to shape its own verdict — domestically and internationally ■

With Respect,
Editorial Team

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Sakartvelo in Shadow: The Final Siege of Georgia's Democracy

The dictatorial legal framework that Georgian Dream (GD) is establishing in Georgia as a governance tool threatens to permanently sever any remaining ties Georgia has with the West, particularly with the European Union.

The ruling party of Georgia is currently navigating the final legislative stages of a sweeping amendment to various laws, including the Law on Grants, Law on Political Associations of Citizens and Criminal Code, a move that represents the culmination of a multi-year campaign to dismantle the country's independent civic infrastructure. While the government's rhetoric frames these changes as a necessary shield for national sovereignty against "Deep State" interference, the legal reality suggests a clinical, systematic blueprint for a total authoritarian consolidation.

For over a decade, Georgia's civil society served as

the primary check on executive overreach in the absence of a robust parliamentary opposition. Today, that check is being forcibly removed. This latest legislative salvo is not merely a revision of bureaucratic procedure, but a declaration of total war on the very concept of political dissent, sacrificing along the way non-governmental organizations (NGOs), independent media, civic activism, and even higher education. As the March 2026 deadline approaches, the window for a pluralistic Georgia is being surgically and permanently closed.

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The Legislative Dragnet: Closing the “Loophole” Era

The Georgian Dream’s obsession with foreign funding has evolved from a populist talking point into a lethal legal instrument. The 2026 [amendments](#) represent a radical escalation in both scope and severity, moving far beyond the “transparency” arguments used in previous years. This is a transition from marginalization to criminalization.

The catalyst for this renewed aggression appears to be a defensive reaction to continued international solidarity. In November 2025, EU Commissioner for Enlargement Marta Kos [noted](#) that EU financial assistance to Georgian civil society had doubled, emphasizing that Brussels was “looking for ways to give money without damaging their existence.” For the GD leadership, this was viewed as a direct provocation—an attempt by foreign powers to maintain influence and sustain what they characterize as a “fifth column.”

The proposed law targets the “loopholes” that allowed pro-democratic forces to survive previous crackdowns. The definition of a “grant” has been expanded to a degree that defies traditional legal logic. Under the new text, a grant is defined as: any funds or in-kind contributions transferred by any foreign entity to any other person that are used or may be used with the belief or intent of exerting influence on the government, state institutions, or any part of society, for activities carried out or to be carried out aimed at shaping, implementing, or changing the domestic or foreign policy of Georgia.

By including “in-kind” contributions, the government has cast a net so wide it captures almost every form of intellectual or technical exchange. Whether it is a software license, a digital library subscription, or a pro bono consulting session, if the state deems the intent to be “shape policy,” it becomes a criminal transaction.

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The law applies retrospectively to existing grants, requiring organizations to obtain state approval before dispersing funds already legally received, meaning that if the individual or organization received a grant that did not require consent at the time of receipt, it will require consent at the time of entry into force of this law. This might even apply to organizations’ savings if the funds originated abroad. The grantee will now be obliged to seek approval from the relevant state authorities within one month of the law’s entry into force.

From Fines to Felonies: The Price of Disobedience

Perhaps the most chilling aspect of the 2026 legislation is the transition from administrative penalties to criminal liability. In fact, many newly introduced offenses are criminalized outright. The era of manageable fines, which organizations often crowd-sourced or challenged in court, is over. In its place is a regime of incarceration designed to induce absolute compliance through fear.

The Incarceration Framework

Operating under a foreign grant without prior government approval will now carry a sentence of up to 6 years in prison. In practice, this reverses the traditional burden of proof, requiring recipients to demonstrate that their funding is not intended to influence policy - a “guilty until proven innocent”

standard that is impossible to satisfy, especially when the courts are captured and highly politicized.

Money Laundering as a Political Tool

The GD is concurrently amending the Criminal Code to introduce up to 12 years of imprisonment for money laundering linked to political activity, unless the Government consents to such activity being financed with foreign money. In the Georgian context, “political activity” is defined so broadly as to include human rights advocacy, anti-corruption research, and election monitoring. Seeking permission for such activities is absurd and defeats the purpose of independent watchdogging or policy analysis. Moreover, by labeling funding for these activities as “money laundering,” or considering the dispersed funds, which have not received prior Government permission, as “money laundering,” the state can seize assets, freeze bank accounts, and imprison leaders under the guise of financial integrity.

Barriers to Political Participation

In a move reminiscent of authoritarian “lustration” strategies, individuals employed by organizations who are deemed “foreign agents” will be barred from joining a political party for 8 years. This effectively decapitates the opposition and civil society by preventing the country’s most educated and experienced policy experts from entering the formal political arena. It ensures that the only viable path to political participation is through the ruling party’s patronage network, effectively creating a one-party state by attrition.

The Death of the Service Contract

For the past two years, international donors—including the UN, the Council of Europe, and the EU—have maintained a presence in Georgia through “service contracts.” These allowed for the provision of legal aid, the empowerment of investigative jour-

nalists, and the support of human rights defenders without falling under the “Foreign Agent” branding.

The 2026 amendments kill this workaround. By equating service contracts with grants, the GD has ensured that technical assistance, the transfer of specialized knowledge, and even basic expertise require prior government approval.

Crucially, the law targets both the giver and the receiver. This creates an impossible environment for international organizations. If a European foundation provides funds (say through a subscription to a service) to a Georgian media outlet without the GD’s “green light,” the foundation’s local representatives may be criminally liable, while the recipient of the media contract will definitely be liable.

Diplomatic Repercussions and the Vienna Convention

These amendments seem to be in clear contravention of the Vienna Convention on Diplomatic Relations, which [stipulates](#) that the receiving state must exercise its jurisdiction in a manner that does not “interfere unduly with the performance of the functions of the mission.” By criminalizing the very act of funding civil society—a core function of many democratic missions—Georgia is effectively signaling its withdrawal from the international rules-based order. But the law can extend further. The diplomatic missions might not be able to conclude contracts with the individuals (for translation, catering, media services, etc.), who are publicly active, or active on social media, and dislike (or openly like, for that matter) what the Government does. Because in all cases these individuals will be receiving foreign funds (which is now qualified as a grant) while engaging in an activity that affects a part of society.

The Criminalization of Policy Research

Under the new definitions, any research or analytical work aimed at identifying gaps in state pol-

icy—whether in labor rights, environmental protection, or social welfare—becomes a criminal offense if supported by foreign funds or in-kind resources (such as digital databases). If a researcher identifies a legislative failure and proposes an adjustment, the state now views this as an attempt to “influence domestic policy” without the necessary government authorization, punishable by up to 6 years of imprisonment. This creates an intellectual vacuum where the state is the only entity permitted to evaluate its own performance. Funny enough, if an organization decides to play by the “rules” and applies for permission and, by any wonder, receives it, the Government maintains the right to withdraw the permission if it disagrees with the content.

Obstruction of Community Advocacy

The law effectively outlaws the provision of essential services that empower citizens. For example, NGOs providing legal assistance to rural populations for land registration or representing citizens in disputes with local municipalities can now be viewed as political actors. Because their mission involves helping citizens interact with state institutions, their foreign-funded operations are interpreted as an unauthorized attempt to exert influence on state bodies, leading to immediate criminal prosecution of the staff. This leaves the most vulnerable segments of society without legal recourse against government overreach.

Control over Academic and Intellectual Exchange

The inclusion of “in-kind” contributions extends the state’s reach into the academic sphere. Access to foreign libraries, collaborative research software, or participation in international academic networks can now be classified as receiving a “grant” for the purpose of shaping Georgian policy. This forces students and academics to choose: either strictly adhere to state-approved narratives or face the prospect of being labeled a criminal for engaging

in the global exchange of ideas. The result is the provincialization of Georgia’s intellectual life. Yes, application of the law to such academic activity probably will not happen outright, as the GD has a bigger fish to fry (NGOs, Think Tanks, Media Organizations, Civil Activists), but the fact that the wide net cast over society also encompasses academia is worrying and indicative of the dictatorial nature of the laws.

Mandatory Political Neutrality for Business

The Georgian Dream will also cover the private sector in the new laws. New amendments to the Code of Administrative Offenses target business entities that engage in “public political activities” unrelated to their core entrepreneurial interests. Initial violations (say, expressing a position through a public statement, or donating to a policy cause) result in a fine of GEL 20,000 (approx. EUR 7,000). However, subsequent “offenses” trigger criminal liability. This effectively forces the business community into a self-imposed state of “political neutrality.” In a small economy like Georgia’s, where government contracts are a primary source of revenue, this law ensures that the business elite remains subservient. Any business who speaks out against corruption or the erosion of the rule of law can now be silenced with a single administrative decree, followed by the threat of prison.

The Viability Crisis: Sector Attrition

The impact of these laws is exacerbated by the fragile financial state of Georgian civil society. Data from the European Training Foundation (ETF) [reveals](#) a stark reality:

- 95% of CSO income in Georgia is derived from international grants.
- Only 6% of the local population contributes financially to NGOs.

- Corporate donations are virtually non-existent (evidently, due to the fear of government retribution).

By cutting off international funding, the GD is not just “regulating” the sector, but they are starving it to death. This is an intentional strategy of attrition. When organizations can no longer pay their staff, rent their offices, or publish their reports, they cease to exist. The government can then claim that civil society “failed” because it lacked local support, while ignoring the fact that it made local support legally and economically impossible.

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Systemic Silence: The Non-Recognition Clause

In parallel with the financial restrictions, the Georgian Dream has [introduced](#) a law against “systematic non-recognition” of the state’s legitimacy. This is a direct strike against the media and opposition parties, who questioned the integrity of the 2024 general elections and the 2025 local elections.

Publicly promoting the “illegitimacy of state institutions” can now lead to a 3-year prison sentence or the liquidation of the legal entity involved. This effectively outlaws election monitoring that finds

fault with the process. To strengthen the case, on February 23, the GD also [proposed](#) banning all local election monitoring and creating regulations for translators/interpreters to be used by international observers. In totality, if a watchdog group (which can no longer attend the election process) reports that an election was rigged, they will no longer be “monitoring democracy,” but will be “promoting illegitimacy,” thus falling under the imminent threat of forceful liquidation.

The Architecture of Isolation and the Final Blow

As the March 2026 deadline approaches (when the new laws will enter into force), Georgia is rapidly acquiring all the functional hallmarks of a monolithic authoritarian state. The Georgian Dream is casting a wide net to ensure that each and every critical voice is not only muted but can be placed behind bars. The amendments in the Criminal Code and Law on Grants, officially enacted in the name of strengthening sovereignty and preventing “foreign-funded revolutionary scenarios,” are in reality the final instruments needed to isolate Georgia and remove it from the international radar.

The regime’s dictatorial trajectory is clear: political opponents are labeled as enemies of the nation, state institutions are systematically captured, and violence in the streets against activists is met with state-sanctioned indifference. This tragedy is occurring in an EU candidate country—a nation that once prided itself on having the most vibrant civil society in the post-Soviet space. That society is now being drained of its lifeblood.

The implementation of these laws marks the end of the democratic era and the beginning of a period of forced state silence. Under the pretext of neutralizing foreign influence, the Georgian Dream has effectively dismantled the very freedoms that define a modern, democratic state. The government’s goal

is to cement absolute power, deliver a final blow to its opponents, and run the country as a private fiefdom.

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The international response to this calculated dismantling of a nation's democratic core has been characterized by a deafening, and perhaps fatal, silence. As Georgia retreats into this self-imposed isolation, it risks becoming a cautionary tale of how quickly a "beacon of democracy" can be extinguished when the tools of the law are turned against the people they were meant to protect. The transition is nearly complete. Unless there is an unprecedented internal or external intervention, the Georgia of 2026 will be defined not by its European aspirations, but by the walls it has built around itself, walls made of legislative text, criminal codes, and the quiet of a population legally forbidden to dissent.

The final siege of Georgia's democracy is not a sudden coup; it is a slow, methodical strangulation by a thousand legal cuts. As the final ink dries on these amendments, the Georgian Dream will have finally achieved its ultimate objective: a country where the only permissible reality is the one defined by the party in power.

The final siege of Georgia's democracy is not a sudden coup; it is a slow, methodical strangulation by a thousand legal cuts. As the final ink dries on these amendments, the Georgian Dream will have finally achieved its ultimate objective: a country where the only permissible reality is the one defined by the party in power. This is no longer a matter of "backsliding"; it is the total replacement of a pluralistic society with a singular, state-controlled narrative, ensuring that Georgia's future is decided not by its citizens, but by a leadership that has rendered itself untouchable. And the deafening silence of the international community only reinforces the GD leaders' confidence ■

Can an Untrustworthy Dictator Undermine the South Caucasus Connectivity

The South Caucasus has entered one of those rare historical windows when structural shifts and political choices have aligned, even if for the moment. Armenia and Azerbaijan, exhausted by cycles of war and arms race, are cautiously building a post-conflict order based on peace and connectivity. European capitals are rediscovering the region as a connective hinge between Europe, the Caspian basin, Central Asia, and the broader Middle East. The United States, for the first time in decades, has declared its financial and economic interest, reified in the Trump Route for International Peace and Prosperity (TRIPP) corridor. Russia, distracted and weakened by its war against Ukraine, is no longer the uncontested arbiter it once was and is actually on the way out of the region, as we have [argued](#) on several occasions on the pages of this journal.

And yet, just as the region becomes more strategically valuable to the West, one of its key states – Georgia – is drifting away from the governance model that makes long-term Western engagement viable. The paradox is impossible to ignore: Western interest is rising as Georgia, the only Black Sea-facing state in the South Caucasus, slides toward an increasingly centralized and unpredictable political system, putting it just [five minutes away](#) from a one-party dictatorship.

This paradox goes to the heart of a larger question. Can the West align its strategic interests and political leverage in the South Caucasus, especially towards Georgia, or will connectivity ambitions and democracy concerns continue to run in parallel, ultimately undermining each other?



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A Region Reopening

For the first time in decades, Armenia and Azerbaijan are speaking in terms that suggest closure of past traumas and the dominance of forward-looking visions, rather than traditional history-based, resentful, and escalating rhetoric. Both Prime Minister Nikol Pashinyan and President Ilham Aliyev have publicly signaled that they do not anticipate a return to large-scale war. The territorial question that defined the region for thirty years has been settled in Azerbaijan's favor, however the looming economic reopening also favors Armenia's long-term strategic interests. What remains is the difficult but manageable process of formalizing borders, reopening communications, and embedding peace in regional connectivity infrastructure. And for that, Western engagement and Russian disengagement are crucial components.

Connectivity is no longer a theoretical slogan that the three South Caucasus capitals often talked about but never really focused on. Rail links, customs harmonization, transit routes, and investment frameworks are now actively discussed after the end of the Nagorno-Karabakh conflict. Armenia is also recalibrating, albeit carefully, its foreign policy, seeking closer institutional engagement with the European Union and deepening ties with the United States. Azerbaijan is positioning itself as a logistical and energy hub that can translate its post-war advantage into long-term economic stability and guaranteeing supply of oil and gas, as well as East-West and North-South trade through its territory.

Russia's capacity to dictate outcomes in the region has narrowed. Its peacekeeping presence in Nagorno-Karabakh has [dissolved](#). Its political leverage in Yerevan has weakened. Its allies in Armenia are on the defensive, even if they hope to rebound during the upcoming elections. Even in Baku, Moscow's influence is increasingly transactional rather

er than strategic, and the recent months' rhetoric from Baku and concrete anti-Russian steps have challenged Russia's importance as long as it is bogged down in an unwinnable war in Ukraine. Yes, Russia maintains a military base in Gyumri, but that presence is not viewed seriously by any regional or international actor. The only real asset that Russia has in the region is a functionally pro-Russian government in Tbilisi.

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Western actors have sensed this opening. The European Union's Global Gateway [initiative](#) seeks to establish alternative corridors to reduce dependence on Russia. Black Sea electricity cable, digital infrastructure, and an upgrade of the middle corridor are the connectivity talking points of Brussels and the Western capitals. Washington's interest in transregional connectivity has also intensified, reflected in high-level [visits](#) and financial and investment support for initiatives such as the TRIPP, designed to reinforce East-West transit logic. Washington's [interest](#) in using Armenia as a producer of microchips and a provider of nuclear energy is also evident in the recently [signed](#) agreements during U.S. Vice President J.D. Vance's visit to Yerevan. The South Caucasus, for the first time in the last thirty years, has the potential to shake off the label of a periphery with frozen conflicts.

Yet every corridor drawn on a policy map eventually runs into geography. And geography in the South Caucasus points to one unavoidable conclusion: Georgia is a sick man of the Caucasus.

Georgia as the Black Sea Hinge

Armenia and Azerbaijan may normalize relations, but cargo does not travel by goodwill alone. Trade flows require cost efficiency, legal predictability, and maritime access. Georgia remains the shortest and most established gateway from the Caspian basin to the Black Sea and onward to European markets. Its ports in Poti and Batumi, its rail infrastructure linking Azerbaijan to Türkiye via the Baku–Tbilisi–Kars line, and its existing transit architecture form the practical backbone of any East–West route that bypasses Russia. But that is all relevant as long as there is an appetite in Tbilisi to do something that contradicts Russia’s interests. And so far, it has not been the case.

The Middle Corridor logic, revived after Russia’s invasion of Ukraine, rests heavily on Georgian transit capacity. Even if Armenia and Azerbaijan reopen additional routes across their own territories, those lines will still require a maritime outlet that is commercially viable and politically dependable. The existing routes are also cheaper and more stable. Georgia’s Black Sea access can indeed transform regional peace into scalable, profitable trade for the whole region.

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Georgia has a government that is willing to counter Russia’s interests.

The West’s connectivity ambitions in the South Caucasus, therefore, cannot be separated from Georgia’s internal political trajectory. Infrastructure can be financed and rail lines upgraded in the South of Georgia, but long-term corridor viability depends on governance conditions that reassure investors and governments alike. And it is also important that the regime ruling Georgia is not undermining the goals of Western powers and regional actors to the benefit of Russia’s interests.

The Missing Ingredients

The first missing element of a full-fledged trans-Caucasus connectivity is a deep-sea port strategy aligned with Western economic logic. The Anaklia Deep-Sea Port [project](#) was conceived as the infrastructure upgrade that would elevate Georgia from a transit state to a maritime hub capable of handling large container vessels. Its [cancellation](#) in 2020, after the termination of the Anaklia Development Consortium agreement, sent a powerful message. A project framed as strategically transformative and backed by Western investors could be reversed by the political decision of one man – an oligarch who rules Georgia. The economic loss was significant; the reputational signal was even greater. But for the oligarch, the overture towards Russia seemed more significant than the geopolitical or financial costs of such a reversal.

The second missing ingredient is predictability. Connectivity is a long-term business that requires confidence in regulatory stability and political direction. Over the past decade, Georgia’s policy record has displayed a pattern of abrupt reversals. Electoral reform promises [were made](#) and [withdrawn](#) in 2019 and 2020. The 2021 political agreement mediated by then European Council President Charles Michel [was signed](#) and later

[abandoned](#). After applying for EU membership in 2022, the Georgian government failed to implement core reforms required for accession talks and subsequently [announced](#) that negotiations would effectively be suspended until 2028. While these appear as internal political tactical maneuvers, in reality, they were strategic choices aimed at ignoring the interests of the Georgian people and Western partners, in favor of only one player – Mr. Ivanishvili. And these reversals show that for the Georgian oligarch, the agreements he strikes with other actors are worthless.

Investors and governments do not demand ideological purity; they demand consistency. If a state's European trajectory can be paused by domestic calculation, questions arise about how other commitments might evolve.

These moves also created a legitimate perception that Georgia's strategic orientation was contingent on the oligarch's political preferences, rather than anchored in values and an understanding of national interests. Investors and governments do not demand ideological purity; they demand consistency. If a state's European trajectory can be paused by domestic calculation, questions arise about how other commitments might evolve.

The third factor is regulatory transparency and competitive transit pricing. Corridors operate on thin margins, and even minor distortions in transit fees or customs procedures can redirect cargo flows elsewhere. Political interference in tariffs or in selective border treatment quickly erodes competitiveness, especially when neighboring states are actively marketing alternative routes. Georgia's comparative advantage historically derived from its image as a reformist, open economy with stable, commercially rational rules. The erosion of rule-of-law credibility, therefore, has direct economic consequences.

Recent developments illustrate precisely why predictability is now in question. Azerbaijani media outlets closely aligned with Baku's authorities publicly [accused](#) Georgia of deliberately delaying Azerbaijani trucks at the border and of imposing elevated rail transit tariffs on fuel shipments destined for Armenia. Whether accurate or not, such accusations alone damage the corridor's credibility. Even more revealing was the Georgian government's response. Rather than clarifying a transparent tariff framework or addressing the [issue](#) institutionally, Georgian Dream (GD) Prime Minister Irakli Kobakhidze reportedly [instructed](#) Georgian Railways to transport one shipment of Azerbaijani fuel to Armenia free of charge as a one-time measure.

This ad hoc political intervention sends a troubling signal. If tariffs can be raised under opaque conditions and then waived by executive instruction, pricing ceases to be a market-based, rule-governed mechanism and becomes a tool of political discretion.

This ad hoc political intervention sends a troubling signal. If tariffs can be raised under opaque conditions and then waived by executive instruction, pricing ceases to be a market-based, rule-governed mechanism and becomes a tool of political discretion. For transit partners and investors, this unpredictability is far more costly than any single tariff level. It suggests that regulatory policy can be instrumentalized, adjusted, or suspended in response to political considerations.

Moreover, the episode unfolded at precisely the moment when the first Azerbaijani fuel shipment to Armenia via Georgia in decades symbolized the potential dividends of normalization from the Armenia-Azerbaijan peace process. Instead of reinforcing Georgia's role as a neutral and reliable facilitator of regional trade, the controversy re-

inforced perceptions in Baku that Tbilisi may fear losing logistical primacy under emerging frameworks such as TRIPP and therefore resort to tactical pressure.

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Corridors depend not only on infrastructure but on trust. Once partners begin to question whether transit conditions are applied consistently and transparently, the economic logic of the route weakens. In this environment, Georgian Dream's record of discretionary decision-making and reactive policy adjustments does not inspire confidence. It reinforces the broader concern that Georgia's strategic direction is governed less by institutional commitments and more by short-term political calculations.

While not openly opposing connectivity in principle, the Kremlin's emphasis on sovereign balance, its irritation at expanding U.S. presence, and its insistence on embedded Russian participation suggest that Moscow views successful trans-Caucasian connectivity less as a regional peace dividend and more as a mechanism that could dilute its influence.

Finally, there is the issue of political behavior. Transit states must avoid acting as spoilers. If a corridor state is perceived as using its geographic leverage for opportunistic bargaining or geopolitical signaling, long-term planning becomes risky. Stability in a corridor is as much political as it is logistical. It is

already known that Russia is poised to be a major spoiler of Caucasian connectivity. Moscow's public messaging on emerging Azerbaijan–Armenia connectivity and the TRIPP initiative reveals a pattern of guarded positioning rather than genuine endorsement. Russian officials have insisted that any transport architecture in the South Caucasus must take into account the interests of all states in the region and their neighbours, a formulation that effectively asserts Russia's claim to continued strategic primacy. They have underscored that Armenia's rail infrastructure [operates](#) under a long-term concession to Russian Railways, reminding that Moscow retains structural leverage over key transit arteries. At the same time, Russian rhetoric has framed Western-led corridor initiatives as politically loaded and potentially destabilizing, warning Armenia against deepening integration with Western frameworks at Russia's expense. While not openly opposing connectivity in principle, the Kremlin's emphasis on sovereign balance, its irritation at expanding U.S. presence, and its insistence on embedded Russian participation suggest that Moscow views successful trans-Caucasian connectivity less as a regional peace dividend and more as a mechanism that could dilute its influence. A fully functional East–West corridor anchored in Armenia, Azerbaijan, and Georgia, and supported by Washington and Brussels, would structurally reduce Russia's gatekeeping role in Eurasian transit. From that perspective, Russia's cautious, hedging posture indicates that it is not necessarily invested in the unimpeded success of such connectivity, particularly if that success consolidates Western strategic footprint in what Moscow still considers its near abroad.

In this context, it is easy to imagine how volatile the connectivity issue becomes if Russia becomes aggressive blocker of the reopening of Caucasus trade routes and Georgia is there functionally aligning with the Russian interests, as the Georgian Dream has done before on a number of occasions, either when reopening air traffic with

Russia, when the whole of Europe closed it, or engaging in the campaign of sidestepping European sanctions to the benefit of Russia's economic interests. Recent statistics on increasing trade with Central Asian republics and the export of oil from Georgia (Most likely Russian oil, as Georgia is not an oil producer) make the regional trade and connectivity agenda highly vulnerable to being undermined by Russia and its allies in Tbilisi.

The Strongman Fallacy

A familiar argument suggests that dealing with a centralized decision-maker, or a dictator, simplifies negotiation. After all, it is just “one man” who will be around for a long time. Agree with him, and the deal is done. This contrasts with the need to navigate the institutional complexities and intricate details of domestic democratic decision-making in European democracies.

But ease of negotiation (even with the dictators) is not equivalent to reliability of outcome. A commitment delivered by personal authority can be rescinded by personal authority just as quickly. The absence of institutional checks may streamline decisions, yet it also increases volatility.

In Georgia's case, Bidzina Ivanishvili occupies a peculiar position. He does not hold a formal executive office, yet he is widely regarded as the ultimate decision-maker. The Georgian dictatorship-in-making is his project. Georgian Prime Ministers rotate and often end up in political obscurity or jail. Speakers of parliament change, never leaving a meaningful impact. Ministers come and go, also often visiting prison on the way out. But the locus of power remains informal and opaque – at one of Mr. Ivanishvili's three residences across Georgia.

This configuration weakens institutional continuity. Policy becomes susceptible to recalibration without transparent debate or accountability. The Anaklia precedent remains emblematic: a strate-

gic infrastructure vision aligned with Western investment was halted without public debate, even though the then-Prime Minister Giorgi Kvirikashvili supported the project. He was [fired](#) and has since not been in active politics. His successor, Mamuka Bakhtadze, is also out of the political landscape. His successor, Mr. Giorgi Gakharia, served. Mr. Ivanishvili, as loyally as one could, is now in [political exile](#) in Berlin, facing treason charges. Another Prime Minister, Mr. Irakli Gharibashvili, Ivanishvili's closest ally and former personal assistant, who was appointed to the top job twice, is in prison. So, the question is obvious – is Mr. Ivanishvili to be trusted, when all of his major speakers and “handshakers on his behalf” are either out of politics, or [in prison](#), and have faced only limited political horizons.

Furthermore, Ivanishvili's political trajectory demonstrates a recurring pattern of abrupt pivots and strategic reversals, underscoring his unreliability as a leader. Georgian Dream was originally launched as a broad, heterogeneous coalition that brought together politicians and ideological currents from across the spectrum—many of whom were publicly endorsed and elevated by Ivanishvili himself. Within a few years, however, he systematically sidelined and removed these figures, dismantling the coalition framework and aligning himself with the Party of European Socialists (PES) before being [expelled](#) from that family. GD's current rhetoric often echoes ultra-conservative and anti-European themes, placing the party firmly in the far-right family. But, notably, even the far-right European groups are unwilling to open their doors to GD. This vocation from center-left to far right is unique in the history of European political parties.

Domestically, Ivanishvili's political alliances have proved transient. Prime ministers have been replaced and sent to jail. Former allies have fallen out of favor and become enemies. The 4th and 5th presidents, who were supported by Ivanishvi-

li during election cycles, later became [adversaries](#) and [public enemies](#). The Georgian Dream could not find a single political party; it could only find a coalition arrangement, relying only on the parties it artificially created. This pattern does not suggest institutional consolidation or that Ivanishvili can be trusted; it suggests centralized discretion unbounded by stable political consensus and not rooted in values.

Washington might think that, in the spirit of pragmatic cooperation with the world's authoritarian leaders (after all, many of them are on the Board of Peace), they could cooperate with Ivanishvili as well. But the Donald Trump administration must remember that Mr. Ivanishvili has never visited Washington, even when he was a formal Prime-Minister. He has also not met high-level American guests. He has [blocked](#) the ambassadorial nominee of the first Trump administration, and he has torpedoed the Anaklia project, despite [warnings](#) from Mike Pompeo, Trump's first administration's secretary of state.

More importantly, Ivanishvili seems to treat the U.S. as an enemy; the relationship with the United States has been distant and, at times, framed through conspiratorial lenses that reference a so-called "deep state." State propaganda machinery, now under the UK [sanctions](#), has been heralding that Trump is [defeating](#) the deep state, and then that Trump is [losing](#) to the deep state. Mr. Ivanishvili's legal disputes with Swiss Bank over personal financial matters have been interpreted as geopolitical targeting by the U.S., reinforcing a narrative of external hostility and finger-pointing at opaque forces in Washington.

Just last year, in July 2025, outgoing U.S. Ambassador Robin Dunnigan [revealed](#) that the Georgian Dream leadership sent a private letter to the Trump administration, which was described in Washington as "threatening, insulting, and unserious" and received extremely poorly. The letter followed U.S.

proposals outlining simple steps to reset relations, including stopping anti-American rhetoric.

When Secretary of State Marco Rubio prepared a formal response, he instructed that it be delivered directly to Mr. Ivanishvili, but Georgia's informal ruler [refused](#) to meet the U.S. ambassador or receive the message, arguing that he could not engage while under U.S. sanctions, which he [described](#) as "personal blackmail." This refusal is politically significant. Rather than seizing the opportunity to de-escalate tensions or repair bilateral ties, Ivanishvili declined to engage directly with the U.S. administration. As Ambassador Dunnigan stated, by refusing even to receive a message from Washington, he placed his personal grievances above Georgia's national interests.

The episode illustrates a deeper problem: despite public statements by Georgian officials about improving relations with the United States, Ivanishvili's actions reveal distrust, resentment, and an unwillingness to engage at the highest level. His posture toward Washington appears defensive and confrontational rather than strategic or pragmatic — reinforcing the perception that Georgia's leadership no longer views the United States as a trusted partner. This episode also illustrates that, like other dictators, Ivanishvili is happy to meet Trump or other world leaders, but is elusive. And if he sends one of his lieutenants to negotiate a deal, the receiving side should be aware that in a few months' time, when the time to follow up comes, the negotiating lieutenant might be in jail or political exile.

From a connectivity perspective, this volatility matters a lot. Infrastructure requires decades-long planning horizons. Strategic corridors require predictable partners. A state whose orientation can shift with internal political calculus becomes a source of systemic risk can not be a reliable partner. And this is the lesson that the Western powers must learn.

The West's Choice: Leverage, Legitimacy, and the Four Rs

Georgia's internal political trajectory can no longer be separated from the West's strategic ambitions in the South Caucasus. Connectivity projects, investment flows, and corridor politics depend on governance. If Georgia consolidates into a one-party dictatorship dominated by informal rule, its reliability as a transit and security partner will inevitably be questioned.

At the same time, the Georgian government remains structurally dependent on the West. Its economic model [relies on](#) access to EU markets, Western investment, international financial institutions, and participation in connectivity initiatives such as the Middle Corridor and TRIPP. The regime may employ sovereignist rhetoric, but it cannot replace Western financial architecture or political legitimacy, at least yet, as Russian and Chinese influence and finances, while on the rise, are still not sufficient to anchor Georgia into an anti-Western economic orbit. That asymmetry creates leverage.

The objective of Western policy should not be destabilization but recalibration and defense of its own connectivity and security interests in the region. Democratic change in Georgia is ultimately a domestic process, yet external actors can shape incentives. Reactive and symbolic pressure has a limited effect. Sanctions, which come months after the wrongdoing, have no effect. Painful sanctions, such as the recently introduced [sanctions](#) on the GD propaganda machinery (Imedi TV and POSTV), are effective, but they lack a political dialogue component, i.e., a message of what the GD should do for the sanctions to be reversed. On the other hand, an engagement without conditions (as some in Washington, Budapest, or Rome would prefer) normalizes authoritarian consolidation, which does not serve the Western or Georgian people's

interests in the medium- to long-term. What is required is coordinated conditionality linked to concrete political and democratic benchmarks.

A minimal framework can be organized around four priorities (four R-s: Refusal to ban political parties; Repeal of laws that undermine civil society and media; Release of political prisoners; and Reform of the electoral code to ensure credible competition. These are not maximalist demands. They are baseline requirements for restoring institutional legitimacy.

The Georgian leadership needs international recognition, economic stability, and continued integration into Western-backed transit and financial systems, while the West needs a predictable, rules-based partner at the Black Sea gateway of the South Caucasus. Those interests intersect. The challenge is political coordination among the Western allies and using leverage smartly.

On the other hand, the Georgian leadership needs international recognition, economic stability, and continued integration into Western-backed transit and financial systems, while the West needs a predictable, rules-based partner at the Black Sea gateway of the South Caucasus. Those interests intersect. The challenge is political coordination among the Western allies and using leverage smartly. Given divisions within the European Union, a coalition of willing states working with Washington and London is more realistic than waiting for unanimity. The approach should therefore combine clearly communicated red lines with enforceable consequences, alongside visible incentives for compliance. Financial engagement, high-level political contact, and participation in infrastructure frameworks should be explicitly tied to measurable democratic steps.

Connectivity planning, especially when there is significant investment potential, requires stable partners. Long-term infrastructure cannot rest on discretionary governance or the informal authority of a newly minted dictator, whose political allegiances are with Moscow. If Western ac-

tors wish to preserve Georgia's role as a strategic hinge rather than a geopolitical risk, they will need to use the leverage they still possess with clarity and coordination to at least reverse the dictatorship-in-making ■

Iran's Uncertain Future and the Fragile Geopolitics of the South Caucasus

When [speaking](#) on French national radio, Robert Malley, President Barack Obama's closest Middle East policy advisor, was asked about the likelihood of war between the United States and Iran. In response, he offered a cautionary anecdote drawn from recent Middle Eastern history to illustrate the dangers of strategic miscalculation and overconfidence. Malley recalled that at the outset of the Syrian uprising in 2011, the administration of Barack Obama believed that Bashar al-Assad would fall within weeks or months. On that assumption, Washington severed diplomatic engagement with Damascus, expecting regime collapse to be imminent. Instead, the Syrian civil war endured for over a decade, with Assad remaining in power in Syria. Malley then noted the irony that, years later, around 2024, when Assad appeared firmly entrenched and the conflict seemingly settled in his favor, the United

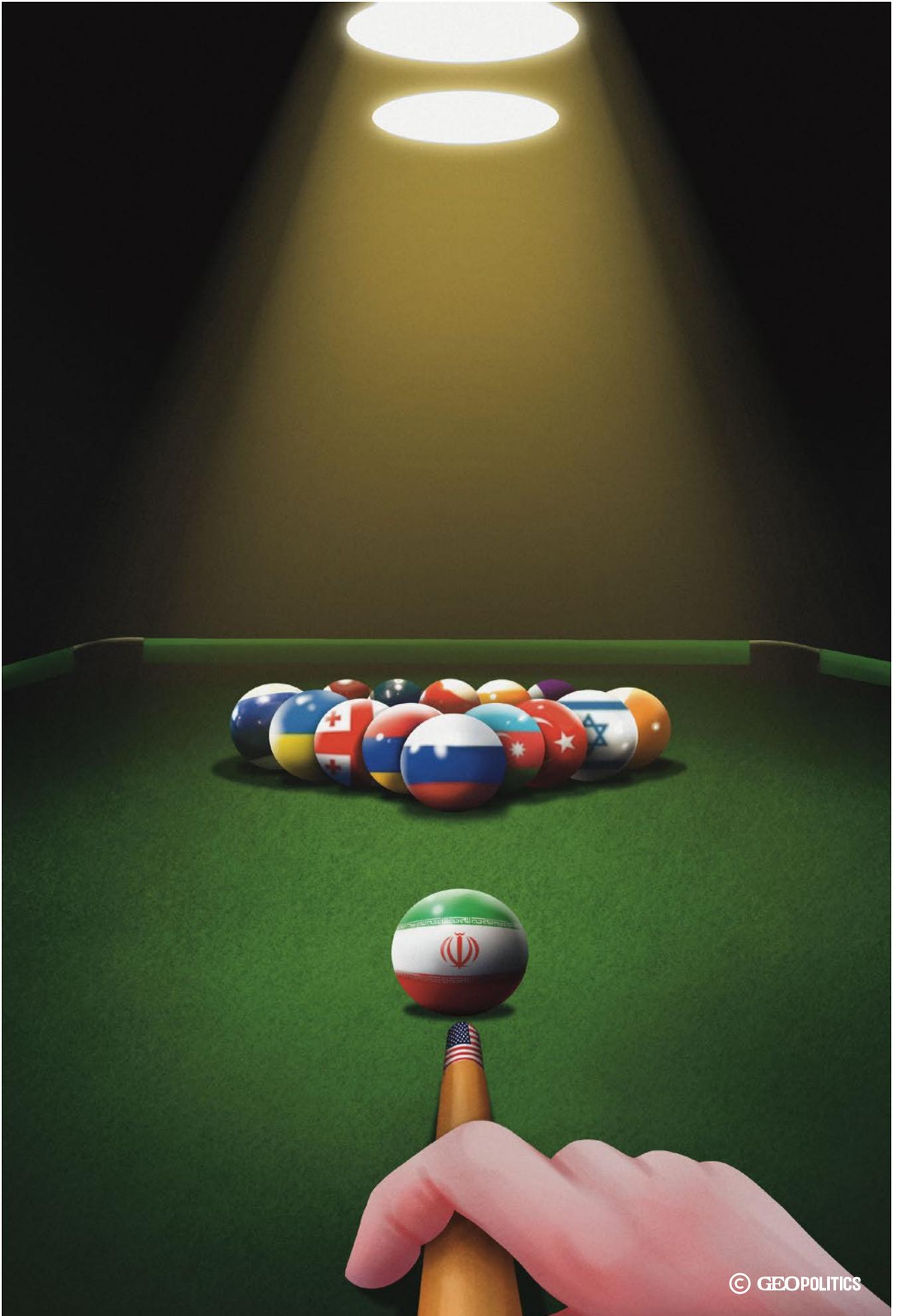
States was reportedly considering cautious, unofficial re-engagement on the premise that he was there to stay. Yet shortly thereafter, unexpectedly, the Assad regime was overthrown by Hay'at Tahrir al-Sham militias led by Ahmed Al-Sharaa.

The underlying message of Malley's story was cautionary: American (and, broadly speaking, Western) policymakers have repeatedly misjudged both the durability and the fragility of Middle Eastern regimes. It also applies to Russia and the Soviet Union in the past, whose collapse was a major surprise and a matter of concern for many Western capitals. Strategic forecasts, whether about imminent collapse or long-term survival, have proven unreliable. By implication, in the case of Iran, assumptions about how quickly escalation would succeed, how resilient the regime might be, or how events would unfold in a conflict scenario should be treated with humility.



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It is important to remember that wartime calculations are often based on flawed assumptions about how long conflicts will last and how stable political regimes truly are. History repeatedly shows that outcomes rarely follow neat or linear paths, and confidence in clear, predictable trajectories has often proven misplaced.

Even with these caveats in mind, it is important to remember that wartime calculations are often based on flawed assumptions about how long conflicts will last and how stable political regimes truly are. History repeatedly shows that outcomes rarely follow neat or linear paths, and confidence in clear, predictable trajectories has often proven misplaced.

Still, uncertainty cannot be an excuse for inaction. Despite the risks of miscalculation, it is necessary to consider plausible scenarios for the South Caucasus in light of the large-scale air attacks on Iran's military targets and political leadership by the the U.S. and Israel and the elimination of the regime's supreme leader, Ayatollah Ali Khamenei, and a cohort of other political leaders and military commanders. In doing so, we will focus primarily on possible developments within the region, while also examining the roles of key external actors, particularly Russia and Türkiye, in shaping and influencing Caucasian affairs.

From Deterrence to Epic Fury

In February 2026, the geopolitical standoff between the U.S. and the Islamic Republic of Iran (IRI) had entered one of its most perilous phases in recent decades, combining heightened diplomatic engagement with an unprecedented military buildup and subsequent air strikes and decapitation of Iran's military and political leadership.

Weeks before the military action, indirect negotiations resumed in Geneva, under the auspices of regional mediators. These talks, involving senior envoys from both capitals, have yielded what Iranian officials [described](#) as “guiding principles” for a potential agreement, yet concluded without a substantive deal, underscoring persistent gaps over core issues such as uranium enrichment and broader security demands. In parallel to these diplomatic efforts, the United States has significantly [reinforced](#) its military posture in the Middle East, deploying multiple aircraft carrier strike groups, hundreds of combat aircraft, and advanced air-defense assets, moves that have brought U.S. forces to levels comparable with major regional conflicts and [raised](#) media and analyst speculation about a [narrowing](#) “window” for military action. This accumulation of military capability, including naval and air platforms within striking distance of Iranian territory, served as both a deterrent and a strategic lever in Washington's pressure campaign, but also signaled the genuine possibility of kinetic confrontation should diplomacy falter.

As it turned out, kinetic confrontation it was: on February 28, the United States and Israel [launched](#) coordinated air and missile strikes across Iran, hitting military sites, missile and air-defence infrastructure, navy, command centres and leadership compounds, and killing Iran's Supreme Leader, Ayatollah Ali Khamenei and other military and political leaders, triggering a leadership transition in Tehran. Iran responded with missile and drone attacks on Israeli cities and U.S. bases and allied states across the Gulf, prompting international protests, diplomatic condemnations, and widespread regional escalation.

Most analysts, myself included, believed at the beginning that the U.S. administration's primary objective was not regime change, as it acknowledged that such an outcome would have entailed a prolonged, costly engagement fraught with strategic

risk. Trump's rhetoric and pressure tactics looked like the U.S. was seeking "a better deal" than the 2015 Joint Comprehensive Plan of Action ([JCPOA](#)) that Washington [abandoned](#) under Trump's first presidency. In case of failure, Trump would have needed a quick and high-profile televised military victory, reflecting domestic political incentives and bolstering Trump's leadership amid the mid-term electoral campaign.

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However, Iran remained defiant and considers the U.S.'s internal political process a vulnerability. Tehran's leadership [framed](#) its position around sovereign rights to "a civilian nuclear program" while [rejecting](#) sweeping caps on its ballistic missile arsenal and regional proxy networks, core tenets of its defence doctrine and regional posture. Tehran's calculated willingness to endure economic and diplomatic isolation appeared to have been matched by its will to project capacity to inflict meaningful costs on U.S. interests and allies across the Gulf. Iran's recent [military drills](#), including temporary closures of the Strait of Hormuz and live-fire exercises, reinforced this strategy.

During the weeks preceding the strikes, Washington and Tehran believed that escalating the conflict might have strengthened their negotiating positions rather than weakened them. The U.S. government was betting that its overwhelming conventional military superiority, including recent deployments of major assets, would have allowed it to conduct a limited, quick military campaign against Iran that would have forced Tehran to ca-

pitulate or return to the negotiating table on U.S. terms.

Iranian leaders had a very different strategic assessment. They believed IRI was capable of inflicting significant short-term pain on U.S. interests, for example, by disrupting Gulf oil exports, threatening closure of the Strait of Hormuz, and attacking regional targets, even if they could not win outright.

Iranian leaders had a very different strategic assessment. They believed IRI was capable of inflicting significant short-term pain on U.S. interests, for example, by disrupting Gulf oil exports, threatening closure of the Strait of Hormuz, and attacking regional targets, even if they could not win outright. Tehran believed that Trump would not have been able to take the risk of having a few dozen or hundreds of U.S. casualties a few months before the midterm elections. They were basing their assumptions on what they saw during the U.S. [confrontations](#) with the Houthis in March-May 2025, when a prolonged cost without clear victory led to reduced U.S. appetite for extended operations, and this happened despite the fact that the Houthis did not manage to kill a single U.S. serviceman. Tehran believed that it had a much greater capacity to cause harm than the Houthis and was betting on the fact that political incentives would change dramatically when U.S. soldiers were killed.

In the immediate aftermath of the launch of the joint U.S.-Israeli military operation, it appears that Donald Trump's earlier reluctance to pursue large-scale intervention in Iran shifted under sustained Israeli pressure and, reportedly, quiet encouragement from Saudi Arabia, according to an [investigation](#) by The Washington Post. Israeli officials seem to have persuaded U.S. policymakers that a rare strategic window had opened to decisively weak-

en — or even bring down — the Islamic Republic, warning that failure to act would entrench Iran's hostile posture for years to come. They reportedly expressed confidence that the regime could be effectively decapitated. Saudi Arabia's discreet backing, despite its cautious public stance, may also have influenced Washington's ultimate decision.

The opposition from China and Russia to the U.S. military action did not carry significant weight in Washington's calculus. Beijing publicly [condemned](#) the strikes, describing them as “unacceptable,” urging an immediate ceasefire and a return to diplomatic dialogue, and warning against further escalation while stressing respect for Iran's sovereignty and regional stability. Russia similarly [denounced](#) the attacks as an “unprovoked act of armed aggression” and called for an immediate halt to hostilities and political solutions, but stopped short of offering military support or direct intervention. While both powers sought to signal disapproval and emphasize diplomatic avenues, their responses were primarily rhetorical and constrained by broader strategic priorities and existing geopolitical entanglements.

Strategic Aftershock in the South Caucasus

For decades, Iran has been treated in Western strategic thinking primarily as a Middle Eastern problem: a regional power whose ambitions, alliances, and internal contradictions reverberate across the Persian Gulf, the Levant, and Central Asia. Yet Iran's northern frontier, bordering Armenia and Azerbaijan and lying just south of Georgia, has long been a relatively quiet but consequential actor in the South Caucasus. A serious political transformation in Tehran, whether orderly or chaotic, would therefore not merely reshape Iran's foreign policy. It would recalibrate the balance of power in one of Eurasia's most fragile and strategi-

cally contested regions, with important secondary effects on Russia's war against Ukraine.

The South Caucasus is already undergoing a slow but profound realignment. Russia's war in Ukraine has weakened Moscow's capacity to dominate the region as a security guarantor and power broker. Türkiye has expanded its influence through its ties with Azerbaijan and regional connectivity projects. Iran, though often overlooked, has functioned as both a buffer and a brake: a status-quo power opposed to border changes, wary of Turkish expansion, and quietly invested in preventing the emergence of a geopolitical vacuum along its northern flank. Whether Iran remains a stabilizing buffer, becomes a bridge to wider integration, or collapses into a source of instability will shape the next phase of South Caucasus geopolitics.

The consequences of regime change in Iran for the Caucasus depend on its character. Three broad scenarios, orderly transition towards a more Western-leaning Iran, chaotic collapse, and hard-line authoritarian replacement, illustrate how divergent the outcomes could be for each of the local and regional actors.

Iran's Fate and Russia's Leverage in the Caucasus

Long before the current geopolitical moment, U.S. policymakers offered two sharply contrasting intuitions about Russia's strategic trajectory: as a senator, in the 1990s, Joe Biden reportedly dismissed Russian threats to pivot away from the West towards China with a [quip](#): “Lots of luck in your senior year... if that doesn't work, try Iran!” At almost the same time, Zbigniew Brzezinski, in his famous “The Grand Chessboard,” [warned](#) that the most dangerous outcome for the United States would be a Russia–China–Iran alignment bound by shared resentment of American power.

A reforming Iran would likely distance itself from Moscow to avoid secondary sanctions and international isolation. The loss of Iranian military-technical cooperation and sanctions-evasion networks would not collapse Russia's war effort in Ukraine, but it would further narrow Moscow's circle of reliable partners.

If Iran undergoes an orderly, pragmatic transition and reintegrates economically with the wider world, Russia's already eroding role in the South Caucasus would shrink further, as Moscow would lose a like-minded regional partner after having already lost its ability to present itself as the sole guarantor of stability to Armenia and Azerbaijan. A reforming Iran would likely distance itself from Moscow to avoid secondary sanctions and international isolation. The loss of Iranian military-technical cooperation and sanctions-evasion networks would not collapse Russia's war effort in Ukraine, but it would further narrow Moscow's circle of reliable partners. Over time, Iran's reintegration into global energy markets could depress prices, indirectly weakening Russia's war economy.

If Iran collapses into prolonged instability, Russia might enjoy a short-lived resurgence as a self-styled "indispensable stabilizer," exploiting chaos to justify security arrangements and political leverage, but in this context, Türkiye will certainly have more cards to fill the void, as at least two local actors (Azerbaijan and even Armenia) would welcome it. In the short term, instability in Iran could distract Western attention and drive up global energy prices, temporarily benefiting Russia's war economy. But a collapsing Iran would be an unreliable partner, unable to provide sustained military or diplomatic support. Moscow would gain tactical breathing space but lose a strategically useful ally.

If, finally, Iran hardens into a nationalist or authoritarian successor regime that remains hostile

to the West, Russia's position would stabilize but not meaningfully improve: Moscow would retain a tactical partner and a shared interest in resisting Western influence, yet without the economic or strategic depth to restore Russia's former dominance in the Caucasus. For Russia, this scenario would be the least disruptive. The war in Ukraine would proceed largely unaffected, shaped more by battlefield dynamics and Western policy than by Iran's stance.

Ankara's Opportunity and Anxiety

Türkiye could be the quiet winner in most scenarios in the South Caucasus. Türkiye is playing a long game of corridors, connectivity, and influence, not ideology. As Türkiye's core objectives in the South Caucasus are unbroken east-west transit routes, Turkic world integration, reduced Russian dominance, and contained (not destroyed) Iran, it could find opportunities in the upcoming change. Nevertheless, the chaos in Iran is not desirable, if only because Türkiye is Iran's second biggest trade partner after China and potentially the main way out for potential refugees and migrants from there.

If Iran operates an orderly transition towards a more democratic, Western-leaning, or semi-Western-leaning country, Türkiye will lose Iran as a regional rival and will gain a more predictable neighbor. Such an Iran would be less threatening but also less easily sidelined, and Ankara would face a more competitive environment for influence in the Caucasus.

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Baku, too, would benefit from expanded trade while encountering firmer constraints on maximalist geopolitical projects. The net effect would be a more multipolar South Caucasus, characterized less by coercion and more by bargaining. A potential strategic benefit of such a scenario would be Türkiye becoming a connector between Europe, the Caucasus, Iran, and Central Asia.

Should Iran descend into chaotic collapse and instability, Türkiye's policy would have to pivot toward containment and risk mitigation: Ankara would work to prevent spillover of refugees and militancy into eastern Türkiye. Ankara is particularly cautious about a possible upsurge of Kurdish militantism, as 6 to 8 million Kurds live in Iran, and some of them (the Kurdistan Free Life Party (PJAK)) have close ties with the Turkish PKK (Kurdistan Workers' Party). Additionally, among the 20 million or so Azeris residing in Iran, many consider Türkiye, as much as Azerbaijan, their ethnic kin state and could seek Türkiye's protection. Türkiye could also exploit the vacuum by deepening security and economic ties with Azerbaijan, Armenia, and Georgia, though it would be constrained by concerns that turmoil in Iran might threaten Türkiye's own security and energy routes. A strategic outcome of such a scenario for Türkiye would be its increased leverage within Iran, but increased pressure on corridors and transit routes. The scenario offers significant opportunities but also greater instability and the risk of overextension.

In a scenario where Iran is replaced by a hardline or nationalist authoritarian regime that remains hostile to Western influence but stable domestically, Türkiye would likely calibrate its policy to balance competition and pragmatic coexistence: Ankara may continue to advance the "Turkic world"

concept with Baku and other allies while managing tensions with a revisionist Tehran that views Türkiye's expanding influence warily, especially over Turkic populations in Iran (Azeris, Turkmen, Qashqai, etc.). In this case, Ankara would continue to support transit and peace initiatives in the Caucasus but remain alert to Iranian resistance to projects perceived as sidelining Tehran's role, especially if those projects cut across areas close to the Iranian border, such as the Trump Route for International Peace and Prosperity ([TRIPP](#)).

Armenia: Most Exposed, Most Affected

Armenia is sensitive to any Iranian shock. No other South Caucasus state depends on Iran as strategically as Armenia does. Indeed, Iran matters to Armenia because it has been one of the two non-hostile borders (the only one in the south). Iran was, and still is, before TRIPP enters into force, an alternative trade and energy route outside Turkish/Azerbaijan control. For this reason, Iran was quietly but firmly opposing the new, post-Second Nagorno-Karabakh War corridor projects, which Tehran considers a "forced corridor."

In case Tehran normalizes relations with the West and its neighbors, sanctions relief will follow, and Iran will re-enter trade, energy, and transit markets. Armenia will benefit the most from this scenario, as Iran will become a stronger economic and transit partner, giving Yerevan an alternative to over-dependence on Russia. At the same time, Tehran will likely continue opposing TRIPP but peacefully. It could even help Armenia to negotiate its conditions with less desperation and a stronger position. On a supra-regional level, Yerevan can hedge between the EU, Iran, India, and even Türkiye. Some argue that such a scenario would create the best strategic environment Armenia has had since the 1990s.

On the contrary, an Iranian collapse would be the worst scenario for Armenia. Armenia will become more vulnerable, as it will lose Iran as a reliable southern buffer. Armenia is Iran's largest trade partner in the South Caucasus, and Yerevan will also face economic consequences. Geopolitically, Armenia will face increased pressure over corridors and borders from Azerbaijan and Türkiye. Their negotiating position will be strengthened, while Armenia's will weaken. Russia will probably try again to self-proclaim as Armenia's only security guarantor, and, as a bottom line, the country will face coercive diplomacy from all directions.

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If the changes bring in a new regime in Tehran that is authoritarian, anti-Western, but less ideological than the Islamic Republic, this is the “continuity with tweaks” scenario. Iran will remain anti-Western, but more nationalist than ideological and the sanctions will likely persist. Iran will continue resisting any Armenia-Azerbaijan corridor that bypasses Iranian routes. Iran will continue issue-based cooperation with Russia and Türkiye, without large-scale cooperation projects. Armenia is already familiar with a comparable setting and will face predictable red lines. But it will not get large-scale economic integration, as there will be no Western sanctions relief.

Azerbaijan: The Most Ambivalent Beneficiary of Change in Iran

If Armenia is the most vulnerable South Cauca-

sus state to Iran's trajectory, Azerbaijan is the most ambivalent. Baku stands to gain from Iranian weakness, but it also has the most to lose from Iranian collapse. No other actor in the region sits so uncomfortably between opportunity and danger. In their approach to Iran, Azerbaijan and Armenia differ. This contrast is crucial: Armenia fears Iran becoming weak, whereas Azerbaijan fears Iran becoming uncontrollable. Armenia needs Iran as a buffer; Azerbaijan needs Iran as a managed neighbor.

Iran matters to Azerbaijan for various reasons. First, Iran [hosts](#) 16–20 million ethnic Azerbaijanis, outnumbering Azerbaijan's own population. Tehran has historically suspected Baku of irredentism, and Baku has denied it but never fully escaped the implication. On the other hand, Azerbaijan is one of the very few countries outside of Iran (together with Bahrain and Iraq) where Shia Islam is the majority religion and where Iran has tried to use religion as a powerful soft power tool.

Traditionally, Iran constrains Azerbaijani-Turkish ambitions, especially on corridors and regional dominance, but at the same time, Iran provides energy, trade, and transit options that Azerbaijan prefers not to jeopardize. Azerbaijan's core strategic instinct toward Iran is therefore cautious opportunism.

The emergence of a pragmatic, Western or semi-Western-leaning Iran would be the least dramatic but arguably most stabilizing outcome for Azerbaijan. From this situation, Azerbaijan would gain reduced ideological hostility: a pragmatic Iranian government would be less obsessed with ethnic nationalism and with Israeli-Azerbaijani ties. Diplomatic tensions would ease, and security incidents would decline. Overall, a strategic normalisation will follow, and Baku will be able to deepen ties with Türkiye and Israel without constantly provoking Teheran. On the economic level, the north-south trade routes would expand, and

energy swaps and transit cooperation would grow.

But even with a much more democratic and “normalised” Iran, Azerbaijan will not get Tehran’s support on corridor politics. A reformist Iran would still oppose any extraterritorial corridor that would cut Armenia off from Iran. Azerbaijan will probably not gain more leverage over Iranian Azerbaijanis either; Tehran would be more, not less, confident in managing minority politics.

The scenario of Iranian state fragmentation and prolonged instability is the most dangerous one for Azerbaijan, despite superficial temptations. What Azerbaijan might gain in the short term is a weakened Iranian opposition in transit corridors, on the Caspian Sea border delimitations, etc. The Turkish-Azerbaijani leverage will probably expand in the region, and the regional power balance will tilt sharply in Baku-Ankara’s favour. Domestically, a nationalist and irredentist discourse around “Southern Azerbaijan” will probably intensify.

But this scenario contains important strategic risks for Azerbaijan. The millions of ethnic Azerbaijanis in Iran have been separated from the Northern (formerly Russian and Soviet, today - independent) Azerbaijan for two centuries and have undergone different historical processes and transformations. Ethno-cultural similarities do not imply equivalence in mentalities, religious practices, and morals. Baku risks an ethnic blowback. Any instability among Iranian Azerbaijanis creates expectations that Baku cannot safely meet. Any intervention, real or perceived, would invite retaliation and regional escalation. Baku should prioritize border security to manage refugee flows, armed groups, and smuggling, while avoiding losing the careful balance between nationalism and realism.

If hardline nationalists or the military seize power in Iran, it would be the most familiar scenario for Baku, even if it would be highly undesirable. Azerbaijan will gain predictability and limited but

stable engagement. Baku will advance connectivity projects incrementally and continue alignment with Türkiye: the Ankara-Baku axis remains intact without triggering open confrontation. In this setting, Azerbaijan will not avoid Iran’s persistent suspicion, viewing Azerbaijan-Israel ties as existentially threatening.

Georgia and the Iranian Variable

Compared with Armenia’s and Azerbaijan’s existential exposure, Georgia occupies a subtler but no less consequential position in relation to Iran’s future. Georgia does not border Iran, nor does it share the ethnic, ideological, or historical entanglements that complicate Tehran’s relations with its southern Caucasian neighbors. Yet precisely because Georgia functions as the principal east-west transit corridor between Europe and the Caspian basin, Iran’s trajectory matters to Tbilisi in structural rather than emotional terms. Iran can either reinforce Georgia’s role as a connector in a post-Russian Eurasia or destabilize the environment on which that role depends.

Relations between Georgia and Iran have entered a sensitive and increasingly consequential phase, shaped less by bilateral affinity than by Georgia’s broader geopolitical drift. Under the Georgian Dream (GD) government, Tbilisi has gradually distanced itself from the Euro-Atlantic trajectory that once defined its foreign policy and has become more entangled with non-Western powers, most notably Russia and China, as well as Iran, whose role has grown both visibly and controversially.

This shift was starkly illustrated when Georgia’s Deputy Foreign Minister publicly [expressed](#) solidarity with Iran following Israeli strikes, a move that provoked sharp reactions from Israel, Georgia’s domestic opposition, and pro-Western segments of Georgian society. Beyond the diplomatic fallout, the episode signaled a deeper realignment.

Moscow has been actively [encouraging](#) Georgia to participate in alternative regional formats such as the “3+3” platform and the International North-South Transport Corridor (INSTC), in which Iran functions as a central hub. These initiatives dovetail with Georgian Dream’s gradual retreat from Euro-Atlantic integration and its embrace of “strategic neutrality,” a posture increasingly interpreted in Washington and Brussels as tacit alignment with authoritarian powers.

At the same time, Iran’s economic, demographic, and soft-power [presence](#) in Georgia has expanded rapidly. Thousands of Iranian nationals now reside in the country, Iranian-registered companies have [multiplied](#), trade volumes have increased, and tourist inflows from Iran have surged. While much of this activity is formally legal, Georgia is increasingly [perceived](#) by Western partners as a potential platform for sanctions evasion by both Iran and Russia, particularly through financial channels, trade networks, and access to Black Sea ports. As Georgia’s relations with the West cool, its utility to sanctioned states correspondingly rises.

While the Iranian regime has been engulfed in violent turmoil, officials of the Georgian Dream government have largely remained silent. Government representatives and affiliated commentators refuse to address developments in Iran, invoking the principle of non-interference, even as the same voices routinely and enthusiastically comment on perceived failures and social unrest across European states. By contrast, GD propagandists and active supporters have been far less restrained, openly siding with Iranian authorities against protesters, whom they explicitly equate with anti-government demonstrators in Georgia, and celebrating the regime’s “restoration of order.” Some have gone further by urging Georgian audiences to “appreciate” the relative restraint of domestic law enforcement, contrasting Georgia’s handling of protests with the thousands reportedly killed during Iran’s crackdown. In parallel, pro-govern-

ment networks have circulated alarmist claims that the United States might pressure Georgia to open a front against Iran or allow its territory to be used for an attack, framing such hypothetical scenarios as external threats and warning Washington against interference.

More recently, Georgian officials [stepped](#) into the Iranian embassy hall to celebrate the 47th anniversary of the Iranian revolution. Speeches were delivered, hands were shaken, and outside, the Tbilisi TV tower glowed in the colors of the Iranian flag, a gesture usually reserved for uncomplicated friendships. This took place when news screens still carried images of repression in Iranian streets, and while tensions with Washington were rising by the day. Observers could not miss the irony: the very deputy foreign minister praising bilateral ties had only days earlier walked the corridors of power in the United States. Was this clumsy diplomacy, an attempt at balancing impossible pressures? Or was it a deliberate signal: a declaration that Georgia would decide its own posture and resist Washington’s friendly advice or pressures?

Against this backdrop, the future of Georgia-Iran relations depends heavily on Iran’s internal trajectory. The first scenario, also envisaged in the previous case analysis, is a genuine democratic transition in Iran followed by economic reintegration with the West, which would fundamentally alter Georgia’s current role. Georgia would lose its function as a “grey-zone intermediary” facilitating shadow trade, informal connectivity, and sanctions circumvention. Iranian economic activity in Georgia would likely become more transparent and less politically charged, while migration flows would normalize. Strategically, Russia’s reliance on Iran-centered corridors such as the INSTC would weaken, reducing Moscow’s leverage over Georgia. For Georgian Dream, this would be the least favorable outcome: its current Iran policy would become obsolete and politically costly. Yet for Georgia as a state, this scenario would be the most stabilizing,

potentially reopening space for re-anchoring in a Western framework and restoring Georgia's relevance as a pro-Western transit and logistics hub, provided domestic political conditions allow it.

The second scenario, a collapse of the Iranian state into prolonged instability or anarchy, would generate acute risks for Georgia with few compensating benefits. Iranian migration into Georgia could spike, placing pressure on social cohesion and administrative capacity. Trade disruptions would harm sectors already dependent on Iranian imports, while security risks would rise, including organized crime, smuggling, and illicit financial flows. The INSTC would likely become unreliable or collapse, undermining Russia's regional logistics ambitions and removing any economic rationale Georgia might derive from it. In this context, Georgia could become a buffer zone for instability spilling over from the Middle East, prompting intensified Western scrutiny over border control, money laundering, and security cooperation. This scenario would heighten volatility while offering no durable strategic upside.

The third scenario, a transition to another hardline security-state regime in Iran, poses the greatest long-term danger for Georgia's Western trajectory. In this case, relations between Tbilisi and Tehran would likely deepen and become more overtly strategic, encompassing logistics, trade, intelligence cooperation, and sanctions evasion. Iran's presence in Georgia would continue to grow, but with a stronger security dimension, reinforcing parallel cooperation with Russia and China. Georgia would risk being locked into an authoritarian connectivity axis by default, even without ideological alignment. Western sanctions pressure on Georgia could intensify, affecting banking, trade, and EU accession prospects, while Georgian sovereignty could erode as external actors gain leverage over infrastructure, ports, and political elites.

Iran's trajectory acts as a force multiplier for Georgia's own geopolitical drift. A democratic Iran could help pull Georgia back toward the West; a collapsed Iran would destabilize it; and a security-state Iran would cement Georgia's role as a frontline node against Western influence, regardless of Georgian society's preferences.

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The Three Conclusions

Iran's trajectory is not a peripheral variable in Eurasian geopolitics; it is a structural one. The future of the Islamic Republic will shape not only the balance of power in the Persian Gulf but also the evolving order of the South Caucasus — a region already unsettled by Russia's war in Ukraine and Türkiye's assertive regional policy.

Three conclusions emerge.

First, the most stabilizing outcome for the South Caucasus would be an orderly, pragmatic transition in Tehran. A reintegrated Iran would dilute Russia's leverage, reduce incentives for corridor coercion, and introduce a more transactional, economically driven regional dynamic. For Armenia, this would expand strategic autonomy; for Azerbaijan, it would normalize competition; for Georgia, it would reopen Western pathways and reduce grey-zone vulnerabilities.

Second, an Iranian collapse would be the most destabilizing scenario. It would generate refugee flows, economic disruption, and corridor contestation, while inviting opportunistic intervention by Russia and Türkiye. Short-term tactical gains for some actors would come at the cost of long-term volatility. The Caucasus, already fragile, is poorly equipped to absorb systemic shock from its southern neighbor.

Third, continuity under a hardened nationalist regime would preserve predictability but entrench bloc politics. In that environment, Moscow would retain a tactical partner, Ankara would pursue calibrated competition, and smaller states would face constrained strategic space amid sanctions and securitized transit routes.

For Western policymakers, the conclusion is straightforward. Iran policy cannot be treated as a self-contained file limited to the Persian Gulf or nuclear negotiations. Any escalation, transition, or collapse in Tehran will reverberate far beyond the Gulf, shaping Eurasian transit corridors, energy markets, and even the sustainability of Russia's war economy. The South Caucasus sits directly along these fault lines. Decisions taken in Washington or Brussels will therefore have consequences not only in the Middle East but across this already fragile region. It is to be hoped that recent high-level diplomatic engagement from the U.S. Vice President J.D. Vance in the South Caucasus has fully reflected this reality and that discussions with regional leaders have taken into account Iran's central role in the evolving Eurasian balance ■

Terra Nova or Terra Incognita?

Contours of the New World Order

Even without (or before) Donald Trump's second presidency, many honest observers, experts, and politicians would admit that the existing world order, often described as a liberal world order, was exhibiting serious cracks and showing worrying signs of erosion. It was further distancing itself from the original ideas of its creators, and, while rolling over by inertia, not-so-liberal actors started to challenge it directly and indirectly by exploiting institutions meant to ensure their transition to liberalism. Whilst Russia began openly and militarily challenging the inviolability of state borders, China leveraged globalization and institutions such as the World Trade Organization (WTO), the World Health Organization (WHO), and others to its advantage. Meanwhile, both asserted their newfound stamina not only to squeeze liberalism out of various parts of the globe but also to present themselves as alternative powers and economic pillars of the revised world order.

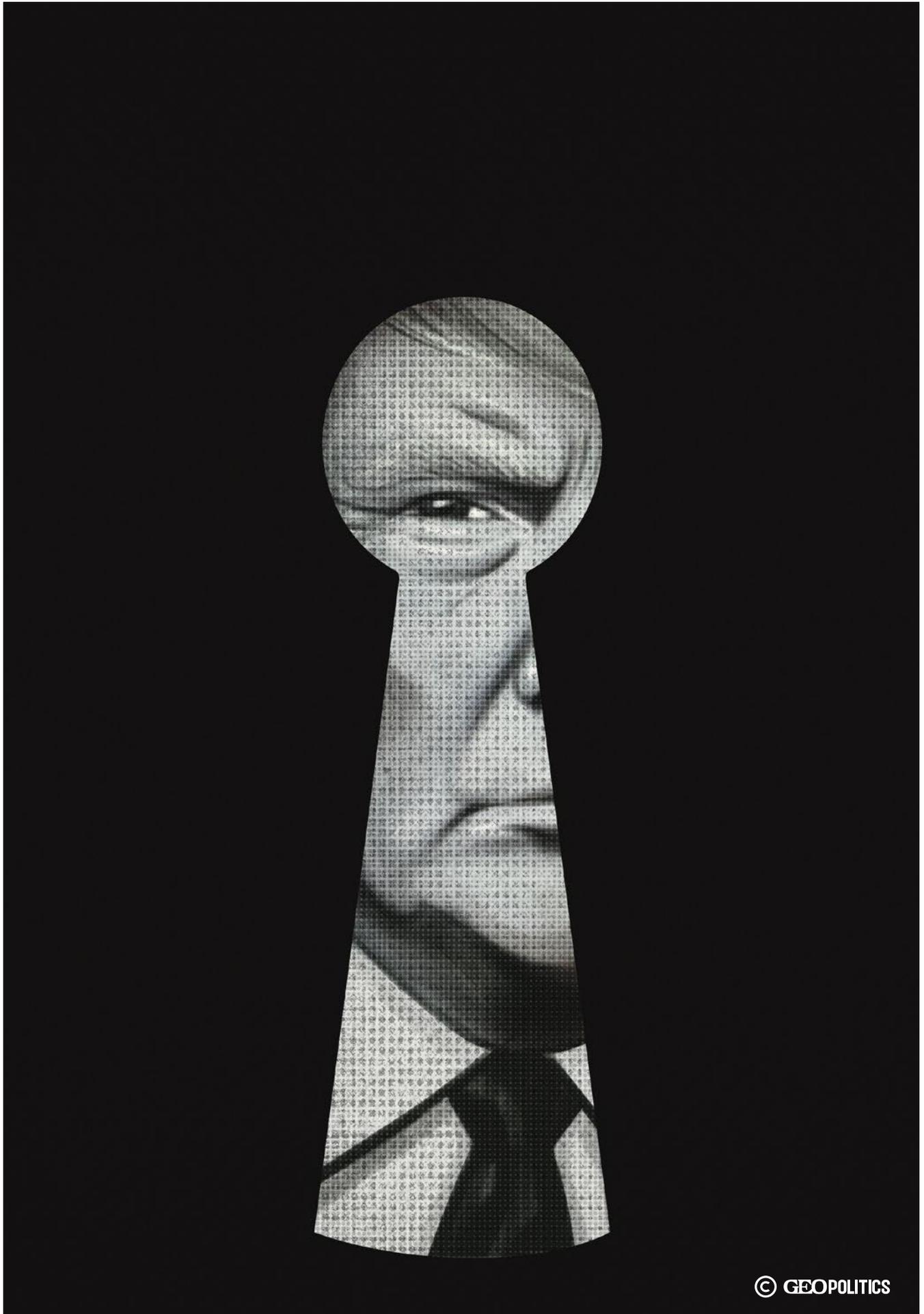
Various Islam-based ideological projects, such as the Muslim Brotherhood, the Islamic State, the Shia Crescent, etc., proliferated not only in the Middle East. The conflict with those projects and ideologies led to mass migration, shifting large parts of the population to Western countries. Many carriers of those ideologies ended up in the traditional Judeo-Christian, or Western societies and countries. Instead of assimilation through the American "melting pot" or European "multiculturalism," they leveraged liberalism for their benefit and caused massive discontent within hosting societies.

While the wealthy world was reaping the benefits of the "knowledge economy," much of the developing world found itself reliant on a different kind of highly demanded commodity: narcotics – increasingly synthetic and far more potent than traditional marijuana or opium. The opioid crisis created a vast market for these substances, opening



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This illustration is inspired by the surrealist aesthetic and monochromatic linework of Piero Fornasetti.

the door to synthetic and deadly drugs that flooded Western streets. Yet it was not only illegal substances that crossed borders. The violent rivalries among drug cartels – at times resembling the internecine struggles of militant groups – generated widespread bloodshed, institutional decay, and state fragility in producing and transit countries. The resulting instability fueled large-scale migration, exporting not only people but also the social and security consequences of this violence into Western societies.

Militant Islam and narco-cartels are not the only reasons for the state failures. Die-hard communist regimes, whether in Cuba, Venezuela, or elsewhere, “ensured” further impoverishment and misery of their respective subjects, causing more displacement and migration. Interestingly, while disastrous practices of the self-proclaimed communist or radical Islamist “liberators” were self-evident, Western academia wholeheartedly embraced their ideologies. Illiberalism plagued not only the developing world but also important clusters of Western societies.

While Western elites largely treated the global promotion of democracy and good governance as inevitable, the focus of major international debates shifted toward climate change and green energy. At the same time, illiberal regimes were becoming more militarily assertive, more economically resilient, and major polluters. Persistent manipulation of the liberal international order, coupled with blatant violations of its rules that carried few serious consequences, gradually turned that order into an object of mockery.

The warning signs were there all along. The canaries were singing loudly – but few chose to listen.

Tipping Points

A world order, indeed any order, becomes dysfunctional once it is no longer enforced. The warning

signs mentioned above were not incidental; they reflected structural weaknesses and contributed to the growing appeal of more conservative agendas within Western societies. For a time, these agendas remained influential yet marginal. The COVID-19 crisis, however, conferred new legitimacy on them and accelerated the rise of nationalist and sovereigntist ideas that had previously existed at the political fringes.

It is therefore hardly surprising that the United States, long regarded as the leader of the free world, allowed itself the latitude to revise the existing international order once that order appeared no longer to serve its national interests effectively. The second presidency of Donald Trump has marked a dramatic inflection point in the evolution of the international system. If his first term from 2017 to 2021 introduced the shock of “America First” into the post-Cold War framework, the second has institutionalized it.

The presumption that the United States must uphold global norms irrespective of reciprocity has been replaced by a principle of conditional engagement.

Trump’s return to office has moved decisively away from the paradigm of ideological multilateralism. Rather than presenting American leadership as a global public good, the administration has redefined leadership as leverage. Alliances are treated not as ends in themselves but as instruments for advancing concrete American interests. Multilateral commitments are assessed through cost-benefit calculations rather than normative loyalty. The presumption that the United States must uphold global norms irrespective of reciprocity has been replaced by a principle of conditional engagement.

This shift does not amount to isolationism. Rather, it reflects a reordering of priorities in Washington: sovereignty over supranationalism, bilateral

deals over multilateral frameworks, and strategic advantage over ideological alignment. In doing so, the United States signals to both allies and adversaries that the post-1991 unipolar moment has definitively ended.

From Unipolarity to Structured Multipolarity

While America was either “leading from behind” or leading agendas of climate change, the rest of the world assumed that it was largely retreating from its role as the Global Leader, as it retreated from Iraq and Afghanistan. Such an assumption gave rise to all sorts of new geopolitical constructs, such as “the Global South.” If the “Global South” remains a loose, internally divided grouping, the rise of so-called middle powers is a tangible, undeniable reality.

Across countries such as Canada, Türkiye, India, Brazil, and Saudi Arabia, middle powers are increasingly able to project political, economic, or security influence. None of them, however, possesses all three capabilities at once. As a result, they tend to adjust their alignments according to circumstance, at times balancing between larger powers and at times pursuing independent courses. Yet their relative autonomy allows them to preserve room for maneuver.

Türkiye, for instance, is both a NATO member and a Dialogue Partner in the Shanghai Cooperation Organization (SCO). India participates in the same organization while remaining the world’s largest democracy, distinct from several of its fellow members. Brazil belongs to BRICS but maintains strong economic and security ties with the United States. Washington, still the most powerful global actor, has taken note of this reality. It no longer seeks to manage every region simultaneously, acknowledging the growing agency of these states. The middle powers themselves appear increasing-

ly prepared to assume a more active role in shaping the emerging order. Canadian Prime Minister Mark Carney captured this shift when he [spoke](#) of the end of the old order and called for strategic autonomy, urging middle powers to embrace greater responsibility in the new one.

The net effect is a Europe more strategically autonomous yet still dependent on American security guarantees. This situation makes NATO stronger, not weaker.

In Europe, Trump’s renewed insistence on burden-sharing has forced NATO members to increase defense spending, altering Alliance dynamics. While critics argue this undermines transatlantic solidarity, proponents contend that it corrects structural imbalances that had long strained the Alliance. The net effect is a Europe more strategically autonomous yet still dependent on American security guarantees. This situation makes NATO stronger, not weaker.

U.S. Secretary Marco Rubio’s recent [speech](#) at the Munich Security Conference reiterated the importance of “civilizational unity” between the U.S. and Europe, but underscored that the U.S. expects European states to assume greater responsibilities. While a number of European countries are uneasy with Trump’s tariffs and other policies, it seems like the rumored end of the transatlantic Alliance is very far from reality.

Economic Nationalism as Geopolitical Strategy

A defining feature of Trump’s second presidency is the elevation of economic nationalism to a doctrine of statecraft. Industrial policy, long taboo in American political orthodoxy, has become central to national security. Strategic sectors - energy,

defense manufacturing, rare earth processing, artificial intelligence - are framed as pillars of sovereignty.

Tariff policy has reemerged not merely as trade protectionism but as leverage in negotiations. The administration's willingness to impose costs on both adversaries and allies signals a readiness to disrupt global supply chains in pursuit of domestic economic revitalization. While this has introduced volatility into international markets and strained relations with the long-standing trade partners, it has also compelled other states to diversify dependencies and reconsider strategic alignments.

The implications are profound. The globalization paradigm of frictionless interdependence gives way to "friend-shoring," regionalization, and bloc-based economic arrangements. Countries now have to navigate a fragmented trade architecture in which access to the U.S. market is contingent upon political alignment and strategic compliance.

The same goes for energy dominance and resource geopolitics. Energy policy illustrates another contour of the emerging order. Trump's second presidency has reaffirmed the concept of American "energy dominance." Expanded domestic production of oil and natural gas strengthens U.S. leverage in global markets and reduces reliance on unstable suppliers.

This approach affects geopolitical calculations across Europe and Asia. For European states seeking alternatives to Russian energy, American liquefied natural gas (LNG) becomes a strategic lifeline. In Asia, energy flows intersect with maritime security and Indo-Pacific competition. Squeezing out China and Russia from Venezuela, curbing Iranian oil exports (and probably soon dominating it), will surely elevate the U.S. role as an Energy Giant and, in parallel, will deny oppressive and illiberal regimes of financial lifelines.

The Reconfiguration of Alliances

Trump's second term has redefined alliance management as contractual rather than ideological. NATO, long considered sacrosanct, is subject to constant review regarding cost-sharing and operational commitments. In Asia, partnerships with Japan and South Korea are evaluated through similar lenses. This does not necessarily weaken alliances; rather, it transforms them. Allies are incentivized to invest more in self-defense and regional leadership.

New models of alliances are emerging. Instead of multilateralism, we see an increase of minilateralism - small, flexible coalitions focused on specific objectives.

At the same time, new models of alliances are emerging. Instead of multilateralism, we see an increase of minilateralism - small, flexible coalitions focused on specific objectives. Rather than relying solely on broad multilateral frameworks, the United States is strengthening targeted partnerships to counterbalance China's rise. Security cooperation among Japan, Australia, and India is gaining prominence, even as broader institutions such as the Association of Southeast Asian Nations (ASEAN) retain diplomatic importance.

These arrangements are pragmatic and issue-driven. They prioritize maritime security, supply-chain resilience, and technology controls. The flexibility of such coalitions reflects a world in which states prefer adaptable alignments over rigid treaty structures.

Erosion of Multilateral Inclusivity and Fate of International Organizations

The modern international system was built on the premise of multilateral inclusivity: the idea that global governance should rest on universal membership, shared rules, and institutional legitimacy. At the center of this architecture stands the United Nations, designed to embody collective security and sovereign equality of states.

Multilateral institutions face renewed scrutiny. The United States remains engaged but demands reform and accountability. Funding commitments are tied to perceived effectiveness and alignment with American priorities.

Multilateral institutions face renewed scrutiny. The United States remains engaged but demands reform and accountability. Funding commitments are tied to perceived effectiveness and alignment with American priorities.

The apparent failing and fading effectiveness of the UN has “graduated” to constant verbal criticism and calls for reform, and it already faces a profound financial crisis. On top of that, the newly minted Board of Peace, which just held its inaugural meeting in Washington, D.C., signals a new trend of chipping away at UN obligations and outsourcing them to a “coalition of the willing.” This shift reflects a broader transformation in global governance. Multilateral inclusivity presupposes that all states - regardless of power - participate in shaping and implementing global norms. However, geopolitical rivalry has increasingly fractured consensus. As major powers compete, the Security Council struggles to produce binding resolutions in major crises. In response, states turn to flexible coalitions that can act more quickly and decisively.

ly. Unlike in previous instances of such coalitions, this particular one – the Board of Peace is created not for warfare, but rather for reconstruction, the job previously assigned to the UN.

If successful, the Board of Peace can become a prerequisite for more similar steps, which will render a large part of the UN obsolete, unless the UN will somehow become more effective – a classical situation of “transform and adapt or institutionally die.” The same fate awaits other inclusive organizations, while exclusive ones will thrive.

In an increasingly multipolar world, universal institutions will struggle to produce consensus, while selective coalitions will deliver operational capacity. The new order will retain some global forums, yet their authority depends increasingly on power politics rather than normative consensus.

In an increasingly multipolar world, universal institutions will struggle to produce consensus, while selective coalitions will deliver operational capacity. The new order will retain some global forums, yet their authority depends increasingly on power politics rather than normative consensus. The balance between these models will shape the future of global governance.

Technology, Sovereignty, and the Digital Order

Every major technological breakthrough reshapes politics, and this moment is no exception. What distinguishes the current era is the speed and scale at which technology has become inseparable from power. Artificial intelligence, quantum computing, and semiconductor manufacturing are no longer merely commercial sectors; they are treated as strategic assets. Control over advanced chips, data

flows, and digital infrastructure increasingly determines geopolitical leverage.

Governments now intervene in areas once considered the domain of markets alone. Export controls, investment bans, industrial subsidies, and technology screening mechanisms are redrawing global innovation networks. Supply chains are no longer designed solely for efficiency; they are constructed with political risk in mind. Firms must assess not only cost and logistics, but also alliance structures, sanctions exposure, and regulatory compatibility. The digital sphere, once imagined as a borderless commons, has become a contested space in which sovereignty is asserted and defended.

This shift is gradually producing distinct technological spheres of influence. The United States and China anchor rival ecosystems built around standards, platforms, capital, and regulatory models. Around them, middle powers experiment with hybrid arrangements, seeking access to both systems while avoiding excessive dependence on either. Some try to hedge; others quietly choose sides. The result is a world in which interoperability becomes more complicated and technological fragmentation more visible. “Digital sovereignty,” once an abstract policy concept, is now operational. States want control over data storage, cloud infrastructure, telecommunications networks, and even algorithmic governance. What used to be questions of innovation policy have become matters of strategic survival.

At the same time, the growing political role of technology entrepreneurs adds another layer to this transformation. In the United States, “tech bros” already wield enormous economic influence and increasingly shape political discourse. Similar dynamics are emerging elsewhere. Entrepreneurs with roots in Eastern Europe, Asia, or Africa are financing political initiatives, reconstruction efforts, and civic projects in their countries of origin. In places such as Belarus or Ukraine, they some-

times challenge entrenched elites whose fortunes were built in older, opaque economic systems. Governments may attempt to slow these shifts by tightening control over digital infrastructure, restricting platforms, or limiting internet access. Yet such measures tend to delay rather than prevent change. Technological momentum is difficult to contain, and over time, it reshapes political hierarchies as surely as it reshapes markets.

The Ideological Dimension: Nationalism Reasserted

Perhaps one of the most persistent features of the emerging world order is ideological. Questions of national sovereignty, border control, and cultural identity have returned to the center of political life, not only in the United States but across Europe and Latin America. Nationalist movements, once treated as temporary reactions, have become durable forces. Their language increasingly shapes mainstream politics and influences how governments define their priorities.

Liberal democracy has not disappeared, but it has changed in tone and emphasis. Elections increasingly revolve around debates over globalization, migration, and inequality. Political leaders are more concerned with securing domestic legitimacy than with earning international praise. Appeals to national interest carry greater weight than appeals to abstract global norms.

It is important to underline that the emerging world order is ideological rather than idealistic. It is driven less by universal aspirations and more by competing visions of sovereignty, power, and national purpose. From this perspective, several trends are already visible.

First, strategic nationalism increasingly guides foreign policy. Governments define their external actions through the lens of domestic renewal. Sovereignty, economic resilience, border control,

and cultural cohesion become organizing principles. Foreign commitments are justified primarily in terms of tangible benefits to the nation. Even long-standing alliances are explained less as moral obligations and more as instruments serving national strength and security.

Second, economic statecraft has become central. Trade policy, industrial subsidies, export controls, and control over critical technologies are no longer treated as purely economic matters. They are tools of geopolitical competition. Artificial intelligence, semiconductor production, energy resources, and digital infrastructure are framed as strategic assets. States actively shape markets to secure technological advantages, reduce dependence on rivals, and strengthen domestic industries.

Third, engagement with the world is increasingly selective. Commitments are assessed pragmatically, not as automatic extensions of shared ideals. Participation in international institutions depends on perceived effectiveness and reciprocity. Governments are more willing to withdraw from arrangements they consider disadvantageous and more inclined to renegotiate terms. Cooperation continues, but it is conditional and interest-driven.

Fourth, practical problem-solving increasingly occurs through smaller coalitions rather than through universal institutions. Instead of relying solely on broad multilateral frameworks that include nearly all states, countries form limited groupings focused on specific objectives. These flexible minipolar arrangements allow faster decision-making and clearer alignment of interests. This does not eliminate larger institutions, but it reduces their centrality in managing crises and coordinating action.

Finally, the United States remains the central power in the system, yet it operates differently from the immediate post-Cold War period. Leader-

ship is defined more transactionally. Engagement is shaped by ideological competition rather than universal mission. Strategic rivalry, especially with China, occupies a central place in policymaking. The language of global guardianship gives way to a focus on national advantage. Universalist rhetoric recedes, and power politics becomes more openly acknowledged.

History suggests that world orders rarely disappear overnight; they evolve. The post-Cold War era's unipolar confidence has yielded to a more contested landscape. Whether this new order proves stable depends on the ability of major powers to manage rivalry without escalation. In this emerging order, power is negotiated rather than assumed, influence is earned rather than guaranteed, and sovereignty reasserts itself as the organizing principle of international life.

Implications for Small States and Lessons for Georgia

While the global hegemon, its principal rival, and a number of middle powers will shape the overall architecture of the new world order, smaller states will operate under very different conditions. They do not possess the economic weight, military reach, or technological capacity to influence systemic rules on their own. Their room for maneuver will depend largely on their geographic position, economic relevance, internal cohesion, and political credibility. In such an environment, survival and development will not be automatic. They will require deliberate and realistic strategic choices.

In the emerging order, what smaller states cannot afford is a form of nationalism that drifts into isolationism. Unlike middle powers, they do not have the luxury of oscillating between competing blocs in pursuit of tactical advantages. Middle powers can hedge. They can cooperate with one side in security matters and with another in trade or energy. Smaller countries rarely enjoy that flexibility.

Sooner or later, they are compelled to align more clearly. The question is not whether they will belong to a camp, but which one.

In the emerging order, what smaller states cannot afford is a form of nationalism that drifts into isolationism. Unlike middle powers, they do not have the luxury of oscillating between competing blocs in pursuit of tactical advantages.

Choosing incorrectly does not mean immediate disappearance. Small states will continue to exist formally. They will retain flags, seats in international organizations, and diplomatic missions. However, if they embed themselves in a geopolitical environment dominated by illiberal or revisionist powers, their sovereignty may become largely symbolic. Key decisions on security, economic policy, and even domestic governance could gradually shift beyond their control. In such a setting, independence would survive in name, but not in substance.

Georgia finds itself in precisely such a situation. Geographically located between the European Union and NATO on one side and Russia on the other, it cannot avoid a strategic choice. The country's cultural heritage, economic orientation, and modern statehood project have been closely linked to Europe and the transatlantic space for more than three decades. From this perspective, alignment with the transatlantic Alliance appears not merely ideological but also practical. It offers the strongest framework for preserving political sovereignty, economic modernization, and institutional development.

At the same time, the path toward integration is no longer what it was in the 1990s or early 2000s. The tools of enlargement and support for democratic transition have changed. External assistance is more conditional and more selective.

Western partners are increasingly focused on burden-sharing and domestic resilience within their own societies. This means that for Georgia, internal consolidation matters more than ever. Democratic institutions, rule of law, and accountable governance are not only moral aspirations; they are strategic assets. Without them, claims to belong to the Western camp lose credibility.

Georgia's history offers sobering lessons. For centuries, positioned at the intersection of empires, Georgians developed a strong instinct for survival. Yet there were also moments when misjudgments and misplaced alignments cost the country dearly in terms of freedom and development. Today's environment requires clarity about scale and capacity. Ukraine, because of its size, population, and military mobilization, may evolve into a middle power. Georgia will remain a small state. Its strategy must therefore reflect that reality.

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The current Georgian leadership's shortsightedness lies in attempting to behave as though the country enjoys the strategic autonomy of a middle power, while lacking the economic, military, and demographic resources to sustain such a posture. In a world that is becoming more structured and less forgiving, this approach carries serious risks. As with international institutions facing systemic change, adaptation is not optional. The Georgian state must recognize global trends and adjust its policies accordingly. Otherwise, sovereignty may erode not through conquest, but through strategic miscalculation ■

NATO as a Glimpse of Hope and an Alternative to Russia's Dominance

Ahead of the 2026 Munich Security Conference, many in Europe were closely watching U.S. signals for reassurance after a turbulent period in transatlantic relations. European leaders [hoped](#) Washington would reaffirm its commitment to NATO and collective defence, clarify support for Ukraine's security, and signal continued cooperation on shared global challenges while outlining a more predictable framework for burden-sharing and defence cooperation. Europeans also braced for candid messages about taking greater responsibility for their own defence as U.S. policy under President Donald Trump emphasised transactional ties and prioritised U.S. interests, scaling up debates in Europe about strategic autonomy.

In Munich, U.S. Secretary of State Marco Rubio [delivered](#) a speech that impressed many delegates and earned a standing ovation by adopting a more diplomatic and reassuring tone than some of the Trump administration's previous statements. Ru-

bio framed the United States and Europe as enduring partners, emphasised historical ties, and sought to soothe transatlantic tensions while still reinforcing core Trump administration priorities. Despite the softer delivery, the substance of his address largely echoed the firm stance seen in Vice President J.D. Vance's 2025 [speech](#) and broader Trump policy. However, Trump's agenda now seemed repackaged and polished, wrapped in classic diplomatic language. However, even Rubio's speech showed that the questions about the future of transatlantic relations and NATO, as one of the core pillars of that relationship, are profound and existential.

This uncertainty resonates not only for the Allies but also, and perhaps even more deeply, for countries that are not yet members. For decades, NATO has functioned as a security guarantee of the highest order for its members, anchored in the credibility of [Article 5](#) and the assumption that collective defence is automatic, not conditional.



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Yet growing transatlantic turbulence inevitably raises uncomfortable questions: Is that guarantee still perceived as rock solid, or could the application of Article 5 at some point become politically conditioned, strategically delayed, or subject to negotiation dynamics and internal veto constraints? From the perspective of non-NATO aspirant countries on Europe's periphery, the stakes are even more existential.

For many states in the Black Sea and South Caucasus regions, NATO represents more than a defence pact. It has symbolized a strategic alternative to Russian dominance. These countries have undertaken costly political reforms, restructured institutions, aligned with Western norms, and absorbed significant economic and security risks in pursuit of eventual integration.

For many states in the Black Sea and South Caucasus regions, NATO represents more than a defence pact. It has symbolized a strategic alternative to Russian dominance. These countries have undertaken costly political reforms, restructured institutions, aligned with Western norms, and absorbed significant economic and security risks in pursuit of eventual integration. The promise was more than membership. It was an escape from a coerced sphere of influence and protection under what was long described as an iron-clad collective defence clause. The unsettling question now is whether that promise remains. Even if a country defeats wild bears, dragons, and hydras on its reform path and eventually reaches NATO membership, does that still equate to an unquestionable guarantee of national security?

This question is profoundly destabilizing because it goes beyond Alliance politics. It touches the strategic psychology of entire regions. If NATO's

security guarantee appears politically contingent or strategically ambiguous, what message does that send to countries still navigating Russian pressure? Is there a realistic alternative to Russia's sphere of influence, or does geopolitical gravity ultimately prevail? For states on the European periphery, the answer to that question can define their reform incentives, their strategic patience, and their willingness to endure risks in pursuit of Euro-Atlantic integration. Most importantly, it shapes the conditions of the internal political battlefield between autocratic and democratic powers and defines the credibility of arguments about the viability of foreign policy choices.

The Promise: NATO as a Stabilizing Force

For more than seventy years, NATO has anchored European security through the credibility of Article 5, widely [understood](#) as a guaranteed collective defence clause rather than a flexible political commitment. Its deterrent force has rested on clarity and predictability. An attack on one would trigger a response from all. That assumption, reinforced over decades, produced one of the most durable security architectures in modern history. NATO became both shield and magnet: a shield that provided hard security guarantees to its members, and a magnet that drew neighboring states toward its political and institutional orbit.

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The stabilizing effect of that guarantee is visible in the most tangible way. Russia has never launched a direct military attack against a NATO member state. The contrast between the Baltic states and

non-members on Europe's periphery is instructive. Estonia, Latvia, and Lithuania, once part of the Soviet Union, entered the Alliance and, despite sustained hybrid pressure, have remained free from military invasion. Georgia, Ukraine, and Moldova, remaining outside the Article 5 umbrella, experienced a very different trajectory: war in Georgia in 2008, annexation of Crimea and full-scale invasion of Ukraine, and continued occupation and destabilization in Moldova. The dividing line has not been geography or history - it has been a NATO membership. Undermining the NATO security guarantee is, by design, the destabilizing factor for the European periphery.

If you were inside NATO, deterrence held. But if you stayed outside, you were vulnerable.

For aspirant states, NATO therefore represented more than institutional affiliation. It symbolized an exit from Russia's sphere of influence. Georgia and Ukraine invested heavily in political reform, defense restructuring, and alignment with Euro-Atlantic standards, yet their momentum toward integration [stalled](#) repeatedly, partly due to internal shortcomings and, primarily, to persistent [hesitation](#) within the Alliance to provoke Moscow. Moldova adopted a policy of constitutional neutrality, but this did not soften Russia's posture. Transnistria remains under Russian control, and Moscow continues to apply economic leverage, energy pressure, and political interference to destabilize decision-making in Chişinău. The pattern, thus, was clear: if you were inside NATO, deterrence held. But if you stayed outside, you were vulnerable.

Turbulence Within the Alliance

Today, the debate around NATO is no longer about enlargement but about cohesion and direction. The Munich Security Conference 2026 made this

tension visible. Critics describe the current U.S. approach as a wrecking ball or a bulldozer, disrupting political, economic, and strategic assumptions that long underpinned the Western-led rules-based international system. Whether pushing forward or rolling back, Washington's posture has introduced a level of strategic volatility that allies cannot ignore.

Europe cannot generate high-end military capabilities overnight. Advanced air defence systems, long-range strike assets, logistics depth, nuclear umbrella credibility, and rapid deployment capacity require years of investment and industrial coordination. The friction is therefore structural.

Officially, representatives of the Trump administration, including the U.S. permanent representative to NATO, [frame](#) current policy as a corrective rather than a rupture. The argument is that the United States is pressing European Allies to assume greater responsibility for their own security. Burden-sharing, they insist, is overdue and necessary given the United States' desire to rebalance toward other strategic theatres. But the underlying question is whether this is merely about financial contributions or something deeper. Europe cannot generate high-end military capabilities overnight. Advanced air defence systems, long-range strike assets, logistics depth, nuclear umbrella credibility, and rapid deployment capacity require years of investment and industrial coordination. The friction is therefore structural. It is not simply about spending targets but about capability gaps that cannot be closed in the short term. At the same time, transatlantic disagreements over a potential peace settlement in Ukraine and the nature of future security guarantees reveal divergent strategic instincts about deterrence, escalation management, and the role of the Alliance itself.

Some analysts argue that much of what is articulated in high-level forums like Munich is narrative signalling rather than evidence of concrete shifts in U.S. commitment. From this view, statements at conferences often outpace actual policy changes. However, the ongoing [restructuring](#) of NATO's command architecture cuts through the noise. In February 2026, NATO announced that the United States would relinquish leadership of two major operational-level commands - Joint Force Command Norfolk and Joint Force Command Naples - transferring them to European allies, with other commands moving toward European leadership on a rotational basis. In practical terms, this marks a historic redistribution of responsibility within the Alliance and is not easily reversible. This shift has strategic implications: it deepens European operational ownership, tests European command-and-control capacity, and raises important questions about the future role of U.S. military leadership within the Alliance.

If the SACEUR post were ever transferred to a European officer, it would represent a historic shift in NATO's command structure and a powerful symbolic reduction of direct U.S. conventional leadership in Europe.

While Washington has so far indicated its intention to retain the role of Supreme Allied Commander Europe (SACEUR), a position held exclusively by an American general since Dwight D. Eisenhower first assumed it in 1951, recent [reporting](#) suggests that even this long-standing tradition is under consideration for change. If the SACEUR post were ever transferred to a European officer, it would represent a historic shift in NATO's command structure and a powerful symbolic reduction of direct U.S. conventional leadership in Europe. While some see this as a long-planned evolution toward a more balanced NATO, skeptics interpret it as evidence that the United States is subtly recalibrating its

footprint, with lasting effects on alliance cohesion and responsiveness.

More concrete signals amplify the unease. Public remarks by Denmark's Prime Minister Mette Frederiksen following discussions with the U.S. delegation, including concern that tensions over Greenland remain unresolved, highlight how intra-alliance frictions can acquire strategic significance. Her [warning](#) that an attack by one member on another would effectively end NATO underscores how fragile alliance cohesion could become if political trust erodes. Institutional questions, such as the redistribution or handover of key commands, further feed speculation about shifting U.S. priorities. Meanwhile, the NATO defence ministerial meeting in January, just ahead of Munich, placed familiar items on the agenda: investing more in defence, strengthening the defence industrial base, and supporting Ukraine. The Secretary General [emphasized](#) unity of vision and a stronger European pillar within NATO.

At the same time, sharp disagreements persist over the possible settlement of the war in Ukraine and the broader approach to addressing the Russian challenge. While official messaging in Munich emphasized unity, visible cracks appeared beneath the surface. Secretary of State Rubio did not directly address Europe's bloodiest war since World War II in his public remarks and skipped a meeting of European leaders focused specifically on Russia's aggression against Ukraine, instead [departing](#) to meet with Hungary's Viktor Orbán and Slovakia's Robert Fico. Both leaders have consistently taken skeptical positions on military support for Kyiv and have advocated approaches more accommodating toward Moscow. These diplomatic choices signal that internal political dynamics within the Alliance are now deeply intertwined with strategic decision-making on Ukraine, complicating the formulation of a coherent deterrence posture toward Russia.

The Credibility Question: Is Article 5 Still Automatic?

Against this backdrop, the central issue is not institutional collapse but perceived credibility. Article 5 remains intact legally. No formal revisions have been proposed. No member has withdrawn from the collective defence commitment. Yet deterrence operates as much on perception as on treaty text. The question is not whether Article 5 exists, but whether it is still understood as automatic in practice.

Yet deterrence operates as much on perception as on treaty text. The question is not whether Article 5 exists, but whether it is still understood as automatic in practice.

For decades, the power of Article 5 derived from strategic clarity. It was assumed that aggression against one member would trigger a collective response without political bargaining. That assumption shaped Moscow's calculus and constrained escalation. Today, however, louder debates about burden sharing, strategic autonomy, conditional commitments, and transactional alliances introduce ambiguity into that clarity. Even if unintended, political [rhetoric](#) suggesting that commitments depend on performance or financial contributions inevitably raises questions about whether collective defence could become politically conditioned in practice.

Deterrence is not only about troops and hardware. It is about credibility and belief. If adversaries perceive hesitation, they probe. If allies perceive uncertainty, they hedge.

This is not an argument that NATO would abandon a member state. It is an inquiry into how signals are interpreted, and this is analytically important because deterrence extends beyond territory. Deterrence is not only about troops and hardware. It is about credibility and belief. If adversaries perceive hesitation, they probe. If allies perceive uncertainty, they hedge.

If Moscow [perceives](#) hesitation, gray-zone pressure increases, hybrid operations intensify, and peripheral instability becomes a manageable risk rather than a prohibitive one. If aspirant states perceive doubt, hedging increases, domestic polarization deepens, and reform momentum weakens as the political and military risks of alignment begin to outweigh the perceived security payoff. This is how alliance psychology translates into strategic outcomes. Deterrence erodes not when treaties disappear, but when belief in their unconditional application weakens. The strength of Article 5 has always rested on the conviction that it is not subject to negotiation at the moment of crisis. The credibility question today is whether that conviction remains as solid as it once was.

The Peripheral View: When Credibility Becomes Existential

For countries on Europe's periphery, debates unfolding within NATO are not abstract policy discussions. transatlantic turbulence, sharper political signaling from Washington, protracted burden-sharing disputes, and moments of strategic ambiguity are closely observed from Tbilisi, Kyiv, Chişinău, Yerevan, and beyond. Even when intended as internal discipline within an alliance, such signals inevitably travel outward.

There are tentative signs that NATO, at least the U.S., is paying more attention to the South Caucasus as a region of strategic importance, even if the Alliance's overall posture remains cautious.

Türkiye is set to host the next NATO Summit in Istanbul, a symbolic reminder that the Alliance's geographic and political horizons extend beyond the traditional Euro-Atlantic core. NATO's Deputy Secretary General Radmila Shekerinska [visited](#) Azerbaijan in January, reaffirming partnership and advancing an Individually Tailored Partnership Programme to set concrete goals for cooperation, signalling a deeper strategic engagement with both Azerbaijan and Armenia rather than a purely procedural dialogue.

Ironically, as Georgia took risks to become the closest aspirant to full NATO membership and a strategic partner of the United States, other actors in the region looked to Russia as the dominant security provider, underscoring how contested influence persists in the Caucasus.

Ironically, as Georgia took risks to become the closest aspirant to full NATO membership and a strategic partner of the United States, other actors in the region looked to Russia as the dominant security provider, underscoring how contested influence persists in the Caucasus. Now, as NATO's engagement in the Black Sea and South Caucasus is still shaped by the legacy of that ambivalence, the tables have [shifted](#), and Georgia is crossed out of any pro-Western equation. NATO partnership tools are expanding, yet senior officials still tend to [publicly](#) overestimate the effects of bureaucratic relations and downplay concerns about partner states deepening ties with Russia, a stance that risks repeating past oversights if strategic competition is taken seriously only in rhetoric.

In such an environment, peripheral states must navigate a complex calculus. They must weigh the security advantages of aligning with Western institutions against the realities of Russian pressure

and the signals sent from within the Alliance itself. If the final destination of unconditional collective defence no longer promises bulletproof certainty, the psychological and strategic foundations of long-term reform and alignment in the Black Sea and South Caucasus regions may weaken just when they are needed most.

The future of Europe's periphery will, therefore, depend not only on tanks, budgets, or communiqués, but on whether NATO can sustain the conviction that its guarantees are real, durable, and politically nonnegotiable.

From the perspective of Georgians who continue to fight politically, institutionally, and socially for

a Western trajectory in an uninterrupted wave of nearly 450 consecutive days of protests, the credibility of NATO and Article 5 matters more than rhetoric. Credibility must be demonstrated through consistent signaling, forward presence, political unity, and strategic clarity. For aspirant states, the demanding and risky fight is rational only if the end goal is believable. If the promise of security appears negotiable, the cost of reform increases, and the appeal of accommodation grows. The future of Europe's periphery will, therefore, depend not only on tanks, budgets, or communiqués, but on whether NATO can sustain the conviction that its guarantees are real, durable, and politically nonnegotiable ■

Trumpling the West: Implications for Georgia

Since the late 1980s, when Georgia began fighting to restore its statehood, the idea of the West has served as a guiding light. This implied that Georgia's independence had to be buttressed by joining the West's principal institutions, NATO and the European Union. No less importantly, Georgia's domestic political institutions had to be modeled on Western liberal-democratic standards.

Since about 2009, when the EU launched its Eastern Partnership ([EaP](#)) program and enhanced its presence in the South Caucasus, Georgians have increasingly spoken about "Europe" rather than "the West." However, they never considered the distinction too important: What is "the West" but Europe writ large?

Following the 2022 Russian invasion of Ukraine, the Georgian Dream (GD) government effectively rejected the vision of a European Georgia, trig-

gering large-scale protests that have yet to abate. However, it still placates popular sentiment by occasionally paying lip service to the idea of European integration.

Following the 2022 Russian invasion of Ukraine, the Georgian Dream (GD) government effectively rejected the vision of a European Georgia, triggering large-scale protests that have yet to abate.

The paradox is that, at the same time, the idea of the West is becoming increasingly problematic in the part of the world to which this term actually refers. The personality and policies of U.S. President Donald Trump are believed to be among the most salient expressions of this problem. He appears to ignore the views and interests of his Western allies and to give preference to autocratic, non-Western



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actors. Some [claim](#) that this amounts to destroying the West as we know it.

If this is true, are Georgians somewhat off the mark in their continued commitment to the West? As Natalie Sabanadze [wrote](#) in these pages, “the traditional categories of ‘pro-Western’ and ‘anti-Western,’ which have long structured Georgia’s political life, lose much of their political relevance.”

This makes Georgian democrats, bravely marching in the streets of Tbilisi with European flags, resemble the Christian hermit in Friedrich Nietzsche’s *Thus Spoke Zarathustra*: they continue to praise God, unaware that He is already dead. Perhaps Georgia should correct its course to align with global trends, as GD propagandists persistently suggest?

What Is (Was?) the West?

One cannot answer this question without revisiting the origin and meaning of the idea. There is no consensual definition of what “the West” means. However, according to interpretations I find more convincing, and that better reflect the term’s widespread use, the idea emerged in the mid-19th century as an heir to two broad civilizational visions: Christendom and Europe. The new concept was necessary to keep Russia (despite being religiously Christian and geographically European) out and the United States in. It comprised political powers and societies that espoused, or were expected to espouse, values and norms grounded in the Enlightenment (broadly understood as liberal) worldview.

Since then, opinions regarding the specific borders of the West have fluctuated over time (at times even Germany was excluded; at times even Russia was considered a possible member), but the core criterion remained more or less the same: it was [grounded](#) in geography and historical heritage, but also in values, norms, and ways of life.

The perception of the West that people usually have in mind today was shaped in the aftermath of World War II. It became synonymous with “the Free World,” professing political, economic, and personal freedoms, and comprising the United States and Western Europe. It stood in opposition to the part of the world that denied those freedoms – the Communist camp led by the Soviet Union.

Arguably, Western commitment to freedom was never impeccable. It included politically unfree countries such as Spain and Portugal and propped up ruthless dictators, so long as they opposed the main adversary, the Communist world. However, this was justified by the perceived necessities of the power struggle: smaller demons had to be tolerated as allies against the larger one (just as it had earlier been deemed right to ally with Joseph Stalin against Adolf Hitler).

For quite some time, Western norms – as well as the image of Western power behind them – were central to the worldviews on which former Communist nations built their policy visions. Georgia was one of them.

Probably, the light of the West shone brightest in captive societies under Communist dictatorships. The allure of Western freedom and prosperity evolved into an irresistible “soft power” that contributed to the Communist world’s implosion from within. For quite some time, Western norms – as well as the image of Western power behind them – were central to the worldviews on which former Communist nations built their policy visions. Georgia was one of them.

Western Values Rejected?

What, specifically, would need to happen for the West to be pronounced dead? At least one of its two foundations would have to be dismantled:

a critical degree of transatlantic unity and a basic consensus on values, norms, and ways of life. There are alarming signs in both areas. But how deep and irreversible is the malaise?

One should remember that the demise of the West has been heralded many times before, yet it has eventually overcome its crises and emerged even stronger. This does not preclude the possibility that this time the decline may be real. However, it is also quite possible that the West is undergoing another painful but inevitable process of redefinition and reformatting. We still do not know which is the case.

Let us examine specific indicators of decline more closely. It is widely believed that the rise of nationalist populism — of which the Trump phenomenon is only the most conspicuous and consequential example — constitutes the principal threat. Supposedly, it undermines the values on which the idea of “the West” rests.

There are good grounds for concern. Assumptions that were once taken for granted are increasingly being questioned. In particular, Trump and his MAGA movement represent a streak of electoral Caesarism that displays disdain for the system of checks and balances upon which the success and stability of American democracy have long been [based](#).

The rise of MAGA, as well as nativist populist movements in Europe, should be understood as symptoms of (or reactions to) broader structural problems within Western democracies and in the global order.

At the same time, criticizing Trump’s grave faults should not lead us to become overly fixated on his goodness or badness (or the precise degree of

the latter). The personal traits of U.S. presidents do matter. Yet the rise of MAGA, as well as nativist populist movements in Europe, should be understood as symptoms of (or reactions to) broader structural problems within Western democracies and in the global order.

The broader picture suggests that the very idea of the West has been subjected to sustained criticism for decades, much of it originating within Western societies themselves. Anti-Westernism has increasingly [shaped](#) the outlook of a significant and influential segment of left-leaning intellectual elites. In contemporary scholarship, it has become common to trace the [concept](#) of the West to the late nineteenth century and to [associate](#) it primarily with imperial expansion. Framed in this way, the West is linked to domination, exploitation, violence, and racial hierarchy, rather than to the intellectual legacy of the Enlightenment. A particularly visible [manifestation](#) of this shift is the prominence of postcolonial theory in American universities, where critical approaches to Western power structures have, in many cases, [supplanted](#) traditional Western Civilization courses that once emphasized the philosophical foundations of modern liberal norms.

Ideas such as liberty, equality, the rule of law, respect for human rights, and tolerance of cultural diversity may be universal in content, but they also have Western historical origins and are still predominantly practiced in Western societies. One cannot consistently champion these principles while portraying the West as inherently despicable.

Self-doubt and self-criticism are necessary elements of the Western mindset; they enable development and transformation. However, obsessive collective self-flagellation, bordering on self-ha-

tred, undermines the very values that ostensibly “progressive” intellectuals claim to defend. Ideas such as liberty, equality, the rule of law, respect for human rights, and tolerance of cultural diversity may be universal in content, but they also have Western historical origins and are still predominantly practiced in Western societies. One cannot consistently champion these principles while portraying the West as inherently despicable.

Populist reactions against “global liberal elites” are often aggressively illiberal and undermine traditional Western values. Yet other actors associated – rightly or wrongly – with the populist wave advance a legitimate argument for restoring pride in the Western intellectual and political heritage that made modern liberal democracy possible. Which of these tendencies will prove more consequential remains to be seen.

The End of the Globalized West?

Trump and like-minded actors explicitly attack the post-Cold War Western consensus surrounding the “liberal international order.” But does this necessarily imply the destruction of the idea of the West, or rather a partial return to the way it was understood during the Cold War?

The Cold War concluded with what appeared to be a decisive triumph of the West – both as a geopolitical actor and as the principal architect of global norms. Yet, as Michael Kimmage (hardly a Trump apologist) observes, this era was paradoxically marked by what he [calls](#) “the abandonment of the West.” A widespread assumption took hold that liberal ideas were not only universal in principle but also universally accepted (or on the verge of acceptance) in practice. Under this belief, the very notion of “the West” seemed redundant. The term gradually faded from political vocabulary, replaced by the more neutral and ostensibly inclusive euphemism “the international community.”

Sadly, this assumption proved mistaken. On the contrary, Western normative power, in addition to its economic and military strength, generated intense anti-Western resentment, most saliently embodied by Vladimir Putin’s Russia but widely shared across the globe.

The noble yet somewhat vague concept of the liberal international order reflected these exaggerated expectations. As a Georgian, I am particularly partial to this idea, because my country – small and vulnerable as it is – can only be secure within such an order (or at least its approximation). However, it was never clear how such an order could be effectively enforced. Many placed their hopes in the United Nations, but with Russia and China among its key decision-makers, this was never a realistic prospect. Few would openly acknowledge that a unipolar world dominated by liberal powers, that is, the West, represented the best hope (though not a guarantee) for a genuinely liberal international order.

What we now describe as “the crisis of the West” is, to a considerable extent, a crisis of expectations produced by the end of the Cold War.

Was the West powerful enough to enforce such an order, not to mention willing to commit the necessary resources to this costly and thankless task? The debacles in Afghanistan and Iraq, the rise of China, and Russia’s resentful revisionism dispelled such illusions. The post-Cold War “[unipolar moment](#)” had passed, and something different would have to emerge. What we now describe as “the crisis of the West” is, to a considerable extent, a crisis of expectations produced by the end of the Cold War.

The Russian invasion of Ukraine became a testing ground for the West. Putin never concealed that his objective was less about territorial expansion

per se and more about exposing the limits of the Western-led liberal international order. The war initially produced an almost unprecedented display of Western unity. Yet it soon became evident, though rarely stated explicitly, that only the West and a handful of its traditional allies joined the rally. The conflict also revealed a geopolitical and normative chasm between “the West and the Rest.”

The outcome of the war remains uncertain, but thus far, the picture is mixed. The Ukrainian army, with Western support, appears to have succeeded in preserving Ukraine as a nation, yet it has not secured a decisive victory. This constitutes a partial success for Russia.

Trump’s many actions and statements regarding this war, especially the effective suspension of military aid to Ukraine, are inexcusable. However, by the time Trump entered the scene, the war had already reached a stalemate, with Russia holding a moderate military advantage. This resulted from the West’s insufficient resources and/or political will to enable Ukraine to prevail. Under such circumstances, pursuing peace became a rational option — even while recognizing that any such peace would likely be unjust and undignified.

The End of Transatlantic Unity?

Apart from shattering the Western consensus on Ukraine, Trump and his lieutenants have expressed disdain, bordering at times on hostility, toward their European partners. His rhetoric about annexing [Greenland](#) and [Canada](#) is another inexcusable episode, even if interpreted as an unconventional negotiating tactic. The damage to transatlantic solidarity is undeniable.

Yet is it sufficient to proclaim the end of the West? Here, too, the picture is more complex.

The texts most frequently cited as evidence of the new American administration’s hostility to

the very idea of the West are Vice President J.D. Vance’s February 2025 [speech](#) in Munich and the U.S. National Security Strategy ([NSS](#)) adopted in November of the same year. Many commentators detected an unmistakable tone of arrogance toward European allies; the latter have every reason to feel aggrieved. However controversial it may be, this document does not call for dismantling Western unity. On the contrary, it seeks to redefine the common ground on which that unity rests.

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In particular, it explicitly distinguishes Europe from the rest of the world as a “like-minded friend” to which the United States applies a higher standard:

We recognize and affirm that there is nothing inconsistent or hypocritical in acting on such a realistic assessment or in maintaining good relations with countries whose governing systems and societies differ from ours, even as we push like-minded friends to uphold our shared norms, advancing our interests as we do so.

The document draws a clear line between the West as a community of like-minded actors who share fundamental norms, even while disagreeing about their precise content, and the non-West, which espouses essentially different values and is to be approached through transactional Realpolitik. This amounts to abandoning the prospect of a “globalized West” in favor of reconstituting a Cold War–like condition, in which the West was conceived as a more or less exceptional realm of liberty.

The U.S. State Secretary Marco Rubio’s subsequent

[speech](#) at the same Munich Security Conference, considerably more conciliatory in tone, reaffirmed the necessity of Western unity, even as it restated areas of disagreement.

Is Georgia Still Like-Minded?

The rise of illiberal and anti-democratic forces within Western democracies has undoubtedly fueled anxieties about the erosion of the shared consensus on basic norms and about the weakening of the transatlantic solidarity upon which the idea of the West has long rested. No one can say with certainty how far these tendencies will advance. Yet, at this stage, apocalyptic predictions about the end of the West appear unwarranted.

The present crisis of the West, while real, may instead represent a critical juncture — one that compels a reassessment of the inflated expectations generated by the immediate post-Cold War era. The belief that liberal norms would become universally accepted, that the liberal international order could be sustained without clear power foundations, and that Western unity no longer required conscious political effort has proven misguided. A more sober understanding of the limits of Western power — both hard and soft — is now unavoidable.

Such a reassessment does not amount to civilizational collapse. It may rather mark a process of redefinition. This could entail renegotiating the practical terms of cooperation within the West, clarifying the boundaries of solidarity, and restor-

ing a more explicit appreciation of the Western intellectual and political heritage that underpins its institutions. The West may no longer aspire to universalization, but it remains a distinct community shaped by shared historical experience and foundational commitments to liberty, pluralism, and the rule of law.

Western unity has never required uniformity of opinion or perpetual harmony between Americans and Europeans. It has rested on the recognition of common heritage and on the pragmatic understanding that cooperation is indispensable in an increasingly dangerous world.

At the same time, the aggregate economic, military, and technological resources of Western countries remain vast. Even in a more contested and multipolar environment, they are sufficient to ensure that the West continues to play a central role in global politics. Western unity has never required uniformity of opinion or perpetual harmony between Americans and Europeans. It has rested on the recognition of common heritage and on the pragmatic understanding that cooperation is indispensable in an increasingly dangerous world.

For Georgia, the key unanswered question, therefore, is not whether the West is still there, but whether Georgia can be counted among its “like-minded friends” ■

Opportunities Missed: Tbilisi and Kyiv Post 2022

When Hungary's Prime Minister Viktor Orbán finally [gave voice](#) to what had long been slow-steaming in his mind – that “Ukraine is an enemy of Hungary” – the statement was promptly [echoed](#) by the chorus of Georgian Dream-affiliated [media](#), amplified by numerous social media accounts linked with the ruling party. But while Georgian Dream (GD) higher-ups refrained from peddling the message themselves, the underlying sentiment was unmistakably there – that they, too, share the spirit of Orbán's position.

The Georgian Dream and its affiliates have rarely missed an opportunity to disparage Kyiv. Ever since the Russians rolled their tanks deeper into Ukraine, Georgia's relations with its erstwhile ally

have soured and degenerated into a steady stream of verbal assaults on Ukrainian politicians. Four years since the outbreak of the all-out war, what was once a [flourishing bilateral relationship](#) is now strained, bitter, and often openly hostile.

GD politicians bear the lion's share of the responsibility for this. In GD messaging to Georgians, Ukraine under President Volodymyr Zelenskyy was portrayed as Tbilisi's political antipode: a Western-aligned government that has recklessly wrecked the country instead of seeking accommodation with the Kremlin. The opposition also paints GD in comparison to the Ukrainian leadership: not democrats and patriots, but a small group of opportunistic politicians focused on preserving their master's wealth while disregarding popular opinion and long-term national interests.



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Contributor

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But squabbles aside, few have asked whether, and indeed could, Georgia's policy have been fundamentally different had another political party been steering the wheel? Answering this question is not merely a matter of academic curiosity; it also has practical significance. Much of GD's propaganda rests on the argument that Tbilisi's current stance has no alternative, given the country's vulnerable geopolitical position and the persisting Russian occupation of its lands. Therefore, addressing these questions – even if only post factum – remains a crucial exercise for understanding where small states find themselves in this geopolitical conflagration.

The Hard Truths

As with any other counterfactual analysis, establishing a clear stopping point is essential for a realistic assessment of what could have been achieved – and what could not – at a given point in time.

For this article, we set February 2022 as the cut-off date, holding constant everything that preceded the full-scale invasion. In other words, the only variable that changes is the government itself: we assume that when Russia invades Ukraine, the Georgian Dream party is no longer in power and is replaced by an alternative, more pro-Western leadership. Any such government would need to take the inventory, and so do we.

Georgia faced Russia's full-scale invasion of Ukraine in 2022 without external security guarantees. The country maintained a nominal pro-Western orientation, but its international position was significantly weakened by years of democratic backsliding.

First, Georgia faced Russia's full-scale invasion of Ukraine in 2022 without external security guaran-

tees. The country maintained a nominal pro-Western orientation, but its international position was significantly weakened by years of democratic backsliding. Georgia had already achieved major milestones such as the Association Agreement (AA) and [Visa Liberalization](#) with the EU, but relations had lost momentum, particularly after [failed](#) EU mediation efforts in 2021 to resolve the post-election impasse. In the U.S.-Georgia relations, there is also not much to brag about, as the [Strategic Partnership Charter](#), in force since 2009, has become a largely symbolic vehicle, failing to translate into either deeper economic and trade relations or more intensive business and people-to-people ties. Plus, the U.S. focus on the human rights violations has alienated Washington and Tbilisi.

Second, Georgia [faced](#) the Russian offensive in Ukraine militarily weak, perhaps the weakest it had been in recent history. Low military [spending](#) (1.68% of GDP) and a limited number of personnel (around 15,000 combat-ready soldiers), combined with the open and tacit persecution of military officials and officers from the previous United National Movement (UNM) administration, had severely undermined the fighting spirit and combat-readiness of the armed forces. We now know, as GD's own investigations [revealed](#), that corruption under the GD-appointed ministers of defense was widespread, further sapping the military's resources.

Third, and a closely interlinked factor, societal resolve – or the willingness of the population to take up arms or otherwise resist a potential invasion – was also minimal. By 2022, the then-deputy head of the parliamentary defense committee and a former chief of the armed forces under the GD government, Vladimer Chachibaia, [warned](#) that Georgian society was in a state of “depletion” and “fatigue.”

Fourth, the penetration of Russia-friendly actors into public institutions, security agencies, and

the social fabric had reached unprecedented levels. Never before had Kremlin-endorsed political and media figures been so emboldened in public space as in the period leading up to February 2022. For years, GD favored a greater opening to Russia, and pro-Russian actors were paraded on government-affiliated media, with their discourse permeating the domestic political debate and systematically undermining the country's pro-Western orientation. Therefore, even if a new government were able to remove compromised mid-level and top officials, the problem of Russian penetration would persist for years.

The penetration of Russia-friendly actors into public institutions, security agencies, and the social fabric had reached unprecedented levels. Never before had Kremlin-endorsed political and media figures been so emboldened in public space as in the period leading up to February 2022.

Fifth, serious issues exist with cohesion, both in people-to-people relations and in the relationship between citizens and the state. Years of pressure on dissenting views, along with the stigmatization of minorities, civil society actors, and political figures, including by pro-Russian actors, have created an abyss of partisan polarization among Georgians.

14 years prior, Georgia had faced a Russian invasion, with 20% of its territory still under occupation, including areas near key economic arteries. Tbilisi, the country's largest city, political center, and economic powerhouse, has been – since August 2008 – within artillery range of the nearest Russian military base in Akhalkalaki.

Sixth, 14 years prior, Georgia had faced a Russian invasion, with 20% of its territory still under occupation, including areas near key economic arteries. Tbilisi, the country's largest city, political center, and economic powerhouse, has been – since August 2008 – within artillery range of the nearest Russian military base in Akhagori. Although the military situation had been largely frozen since 2008, frequent civilian detentions along the occupation lines with Abkhazia and the Tskhinvali Region/South Ossetia created an atmosphere of uncertainty and latent tension. The number of Russian personnel in the two regions had halved to an estimated 2,500 due to their [redeployment](#) to Ukraine, and deterring their attack was well within the capabilities of the Georgian armed forces, even in their weakened state. Yet the widely publicized images of aerial bombardments and terrestrial invasion of Ukraine amplified public anxiety, reviving the deep-rooted trauma of the 2008 war and heightening psychological vulnerability.

All in all, this leaves us with an uncomfortable truth: by the outbreak of an all-out war, the GD's ten years of governance would have placed any government in an extremely precarious state – without meaningful support from the West, with weakened democratic credentials, fragile military, and a deeply divided society.

Prudence of Restraint, or Picking Sides?

First reactions of GD in February 2022 – [refusal](#) to join sanctions against Russia and the decision not to green-light a charter flight carrying Georgian volunteers to Warsaw shortly after the outbreak of war – may appear, when viewed against the structural constraints of occupation the party inherited in 2012, as well as the vulnerabilities it later created or amplified, as a logical reflection of this uncomfortable reality. This was certainly the message the GD speakers tried to convey in

their press engagements in the aftermath of the invasion. Prudence and rationalism, they insisted, were what defined Tbilisi's chosen path of non-interference. Quite naturally, they did not dwell on the fact that a large part of that vulnerability was of their own doing.

On the contrary, GD tapped into the fear of a renewed Russian invasion and amplified real vulnerability to the political message of impotence. “It will take them a few minutes to turn Georgia upside down,” [warned](#) then Foreign Minister Davit Zalkaliani in a fiery speech on February 28, 2022. Further leaning into that narrative, the Georgian Dream has weaponized the fear of war: it campaigned as a party of peace and stability against the hypothetical catch-all “war party” (lumping together the opposition, CSOs, media, the EU, and the U.S.) in the 2024 parliamentary elections.

The GD, however, chose the opposite path – once a quick Russian victory was out of the question, rather than adjusting, it escalated rhetorically against the West and Ukraine, accusing them of seeking to drag Georgia into a confrontation with Russia.

Our hypothetical government would have been similarly cautious in its actions at the outset of hostilities, while recognizing people's fears, would have led the discourse in a way that united society and quelled these anxieties, compensating for critical flaws in social and political cohesion. That kind of approach would have created a much wider berth for maneuver once it became apparent that Ukraine was holding firm, and international condemnation of the Russian aggression was massive. The GD, however, chose the opposite path – once a quick Russian victory was out of the question, rather than adjusting, it escalated rhetorically against the West and Ukraine, accusing them of seeking to drag Georgia into a confrontation with Russia.

It soon became evident that feigned rationality was only a smokescreen: much of what the ruling party was doing was the product of subjective (and self-interested) political choice rather than the inevitable outcome of structural constraints.

While Georgia's structural vulnerabilities demanded sober strategic reckoning in 2022, they should under no circumstances have deprived the country of its agency. Absent a concerted effort to strengthen Georgia's military capabilities, the *ad nauseam* invocation of weakness and stoking fear amounted less to prudent statecraft than to a declaration of self-resignation, or worse – readiness to surrender without even resisting. The truth is, GD was picking the (Russian) side, rather than staying prudently cautious.

This became evident in GD's [decision](#) not to facilitate organized intake of Ukrainian refugees, while simultaneously opening the borders to hundreds of thousands of Russians. Once again, a preference for financial profit (Russian war migrants left homes with their cash, as opposed to the Ukrainian refugees) trumped moral and humanitarian obligation. Similarly, the choice to refrain from imposing most sanctions – framed by party mouthpieces as a pragmatic move – appeared driven less by prudence about possible Russian retaliation than by the opportunities of war profiteering.

The campaign against Ukraine was too visceral, pervasive, and consistent to be attributed solely, or even mainly, to party-political frictions, for instance, regarding the role of 3rd President, Mikheil Saakashvili, in Ukraine, or the role Ukraine allegedly played in Saakashvili's return to Georgia. Rather, it reflected a deep dislike of Ukraine's actions and a consistent effort to dampen popular support for Ukraine in Georgia, a sort of “vice signaling” to the Kremlin, aimed at creating space for accommodation.

From the moral standpoint, nothing could justify

[blaming](#) Ukraine for provoking the war, or [insisting](#) that Georgian fighters were only mercenaries hired for money, or [threatening](#) to cancel their Georgian citizenship. Demonization of Ukrainian leaders, displaying campaign banners [depicting](#) a contrast between the ruins of Ukrainian cities alongside shiny Georgian ones, can by no means be considered pragmatic prudence. All of that was completely avoidable and, in fact, should have been avoided.

Alternative Policies: Could It Have Been Any Different?

Now that we have established the factual circumstances, including both the structural constraints Tbilisi faced at the time of the all-out invasion and the subjective political choices it has, in fact, made, we can turn to the core question of our analysis: what a new political force could have done more to support Ukraine.

GD policy choices made in response to the invasion of Ukraine did not reflect the dominant public mood but went expressly against it, stoking emotions and strengthening fringe opinions.

Let us look at the simple political fact: GD policy choices made in response to the invasion of Ukraine did not reflect the dominant public mood but went expressly against it, stoking emotions and strengthening fringe opinions. The reality is that anyone at the helm of Georgia in 2022 would possess an unprecedentedly strong popular mandate to do more for Ukraine.

A March 2022 survey by the Caucasus Research Resource Centers (CRRC) [found](#) that 32% of respondents believed the authorities' support for Ukraine was sufficient, while an additional 61% stated that more support was needed. Importantly, this back-

ing extended across a wide range of measures. An overwhelming 97% [found](#) it acceptable to provide humanitarian assistance to Ukraine, such as food and medicine; 96% [supported](#) accepting Ukrainian refugees; and 91% [approved](#) of providing financial assistance. More sensitive steps also commanded majority backing: 66% [found](#) it acceptable to allow Georgian volunteers to travel to Ukraine to fight; 59% [favored](#) restricting the entry of Russian citizens into Georgia; and 53% [supported](#) supplying Ukraine with weapons and armament.

There was also a strong case for moral obligation: Ukrainians were there for Georgia twice when no one else showed up: as volunteer fighters in the war in Abkhazia, and by providing critical helicopters and ships that [evacuated](#) thousands of ethnic Georgians from besieged Sokhumi and Kodori valley, saving their lives. Ukrainian military advisors stood next to Georgia also in 2008, instructing operators of air defense systems that inflicted heavy losses on Russian aircraft, and President Viktor Yushchenko [came](#) to Tbilisi immediately after the war with other Eastern European leaders. So, humanitarian law aside, Georgia had a moral obligation to reciprocate.

A hypothetical pro-Western government could have united the nation around doing more for Ukraine. A responsible government would have seen a unique opportunity to consolidate and heal the divisions that had long plagued the country, to restore a sense of agency in a virtuous cause, while also bolstering the country's resilience. Without escalatory moves in the hard-security field to avoid unnecessary tensions with Russia, it could have offered greater political, moral, and humanitarian support to Ukraine.

There is a range of actions that Tbilisi could have taken:

Diplomatic support: Georgia has joined scores of resolutions, declarations, and statements in sup-

port of Ukraine, but over time, even this rhetorical alignment appears to have diminished. What truly mattered – and what [could have served](#) as a tangible political signal – were regular high-level visits to Ukraine. To this day, only the Parliamentary Speaker Shalva Papuashvili has [traveled](#) to Kyiv once, accompanied by a group of opposition lawmakers. That visit, too, was conducted in April 2022, significantly later than those of other European delegations, and ended without any major political rapprochement. An attempt by 5th President Salome Zourabichvili to visit Ukraine was reportedly intercepted by GD officials, who threatened to impeach her if she went ahead.

Cracking down on sanctions evasion: Even if full-scale, comprehensive sanctions would not have been justifiable – not least given the country's fragile economic situation – Tbilisi still had room to commit to targeted restrictions, particularly on dual-use items. These restrictions should have been enforced rigorously and without exception. Contrary to the claims by GD officials, Georgia's adherence to a ban on dual-purpose goods would demonstrate its commitment to non-interference rather than provoke a military response from Moscow. Crucially, the initiative to demonstrate that no illicit trade was occurring should have rested with Tbilisi. To foster a broader political consensus, the task of monitoring sanctions could have been entrusted to a parliamentary committee or a figure acceptable across party lines and partners, ensuring both credibility and accountability.

Stronger border controls: Stronger filters could have been applied to persons entering the country from both Russia and Ukraine, particularly those coming from the occupied regions of Ukraine. With Russians, priority entry should have been given to opposition members, genuine defectors, and those who openly opposed the war. Individuals implicated in human rights violations or in facilitating financial flows to the Russian budget would have been blacklisted. Travel bans would have been enforced

on anyone already sanctioned by Ukraine, the EU, or other Western partners, as well as those who had previously violated Georgia's Law on the Occupied Territories. In parallel, Georgia would have worked to ensure that its own sanctions lists were upheld abroad.

Humanitarian efforts: Support would have been extended to accommodate a greater number of Ukrainian refugees (according to official statistics, an estimated 28,000 [entered](#) Georgia, largely in an uncoordinated manner) with simplified resettlement procedures put in place. Additionally, a special financial mechanism could have been adopted to earmark a share of revenues from increased trade with Russia for humanitarian assistance to Ukraine. A responsible government would have built on the goodwill with Kyiv and worked closely with Ukrainian counterparts on facilitating the exchange of Georgian prisoners of war held in Russian captivity.

Dual-use assistance: Non-lethal equipment, such as helmets, vests, and medical kits, could have been provided to Ukraine without any restrictions early on, while simultaneously replenishing depleted domestic stocks and replacing outdated weaponry through the armor replacement program (preferably with the U.S. serving as the intermediary). The military and security expertise at the Georgian embassy in Kyiv would have been strengthened, alongside the deployment of medical crews and electricity specialists to support critical infrastructure. Additionally, rehabilitation programs for wounded Georgian and Ukrainian soldiers would have been established.

Military/security preparedness: A responsible government would have seen multiple opportunities to reduce vulnerabilities associated with the persistent occupation of Georgian territories by improving the country's long-term strategic position. Many countries have benefited from NATO's armor replacement programs – older but battle-tested

MBT T-72s and BMPs were sent to Ukraine, while the U.S. and European allies replaced old Soviet hardware with NATO-compatible equipment. Even the simple process of negotiating would have partially restored frayed relations with the Western/NATO allies. If successful, this deal could have been a boon for Georgia's forces, whose armored battlefield mobility has been rather limited. If, however, this was judged too aggressive, too costly, or too impracticable, a decisive move could have been made to radically upgrade defensive air surveillance and air defense capabilities, which have long constituted a major gap. Given that Russia's strategic bombing fleet operated over the Caspian Sea, launching cruise missiles on Ukraine, this could have been useful for Georgia to avoid potential emergencies, both deliberate and unintended. Importantly, since Georgia's existing military radars are already integrated into the NATO command, this could not have been construed as a radical change in policy or posture. Instead, one can infer from recent GD statements that precise suggestions from Western partners in these two domains may have given rise to the conspiracy that the West was "dragging Georgia into war." Experience and learning of Georgian fighters in Ukraine could have been integrated directly (without PR fanfare) into the Military Academy of Georgia throughout the course of the war.

In parallel, genuine progress would have been made on Georgia's territorial defense and civil preparedness, as well as on defense decentralization and small-unit autonomy. Programs and interventions on these matters would have drawn lessons from Ukraine's experience. Infrastructure development, particularly in the southern regions near the country's only border with a NATO member state, Türkiye, would have been prioritized to enhance both mobility and defense.

International platforms: The full-scale invasion of Ukraine has strengthened Georgia's long-held position on the Kremlin's fundamentally aggressive designs, but further Georgian efforts could have

helped fully alleviate post-2008 skepticism about Georgia's conduct in the Tskhinvali Region/South Ossetia, fueled by the notorious [Tagliavini Report](#). The Georgian diplomacy could have worked to tie in the issue of Russia's failure to fully implement the 2008 ceasefire in the ongoing peace talks, as well as to request the removal of Russian military forces from the two regions. In parallel, active opposition to the recruitment of Abkhaz and Ossetian residents into Russian armed forces could have become one of the "soft power" messages tailored towards its estranged citizens.

Moral and Pragmatic

An impartial look at the state of Georgia in February 2022 reveals a weakened nation beset by partisan divisions. The citizens exhibited overwhelming support towards Ukraine, but underlying fears about the possibility of renewed hostilities were persistent. For a truly pragmatic government in Georgia, this would have created an opportunity to heal societal tensions and manage long-held anxieties. Offering support to Ukraine, a country that shared a similar fate not long ago, could have represented a cathartic moment to rally the nation.

Throughout the four years while the war is raging in Ukraine, Georgia's leadership has been blinded by its own starry-eyed vision of Russia as an all-powerful actor, while the reality has been quite the opposite - Russia is being bled hard in Ukraine, and its economy is in a crisis. True, it remains dangerous for Georgia, but deeper integration with the pariah state is hardly a pragmatic move, politically or economically, especially when a panoply of relatively non-aggressive alternatives existed. Through showing a higher degree of solidarity to Ukraine, Georgians could have rebuilt ties with Eastern Europeans with whom they traditionally shared skepticism towards the Kremlin and, personally, towards Vladimir Putin. In contrast to 2008, when Tbilisi's case was effectively

dismissed, the invasion of Ukraine sharpened the sense of guilt - arguably a potent tool to also incentivize Western European leaders to do more for Georgia, to bolster its security and resilience. A once-in-a-generation opportunity created by the EU membership perspective could have been exploited more fully and much faster from the vantage point of 2022, instead of being run into the ground by 2025.

A significant opportunity was missed to strengthen the country's defenses. In a world dominated by transactional relations, solidifying values-based bonds with Ukraine and its allies would cultivate a stronger sense of battlefield kinship. The war-tested friendship with Ukraine would grant Georgians what they have always sought - an unconditional ally who would stand with them in both peace and crisis. Having close ties with Ukraine - a country with one of the largest and most potent militaries in Europe - could also serve as an unconventional form of deterrence. Almost 2,000 Georgians [stood](#) shoulder to shoulder with Ukrainians at the height of tensions in February-March 2022, and up to a thousand continue to do so to this day. One would assume that, should a proportionate number show up for Georgia in its hour of need, any would-be invader would think twice before pointing their guns at Tbilisi.

GD's handling of Ukraine in the aftermath of the full-scale invasion is not only a matter of poor judgment and faulty calculations, but also a story of wasted time and missed opportunities. GD may have wanted to spin its policy choice as pragmatic, but if it was so, only in a narrow and self-serving way - to maximize profit and solidify its grasp on power.

In conclusion, GD's handling of Ukraine in the aftermath of the full-scale invasion is not only a

matter of poor judgment and faulty calculations, but also a story of wasted time and missed opportunities. GD may have wanted to spin its policy choice as pragmatic, but if it was so, only in a narrow and self-serving way - to maximize profit

and solidify its grasp on power. True pragmatism could have brought Georgia together and made it stronger alongside more reliable partners, without resorting to unnecessary jingoism and gung-ho militarism ■

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Mitat Çelikpala

Dr. Mitat Çelikpala is Professor of International Relations and Vice-Rector at Kadir Has University, Istanbul. He specializes in Eurasian security, energy policy, and Turkish foreign relations, serving as academic advisor to NATO's Center of Excellence Defense Against Terrorism.



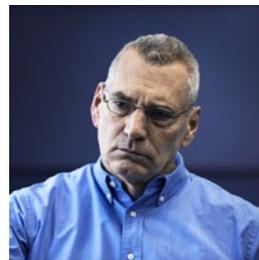
Zaur Shiriyev

Zaur Shiriyev is an independent scholar with fifteen years of expertise in South Caucasus security and conflict resolution. He previously worked as an analyst at the International Crisis Group and Academy Associate at Chatham House's Russia and Eurasia Programme.



Mustafa Aydın

Mustafa Aydın is Professor of International Relations at Kadir Has University and President of the International Relations Council of Türkiye. Former university rector, he has held research positions at Harvard, Michigan, and the EU Institute for Security Studies.



Richard Giragosian

Richard Giragosian is Founding Director of the Regional Studies Center in Armenia and Visiting Professor at the College of Europe. He serves as consultant for international organizations including the Asian Development Bank, EU, OSCE, and U.S. Departments of Defense and State.



Khatia Kikalishvili

Dr. Khatia Kikalishvili is Programme Director for Eastern Partnership at the Centre for Liberal Modernity. She previously advised on Foreign and European policy in the German Bundestag and holds a Ph.D. in European Law from the University of Saarland.



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Teona Giuashvili is a former Georgian diplomat with eleven years of experience, currently researching European and regional security at the European University Institute. She specializes in multilateral diplomacy, conflict resolution, and Georgia's European integration.



Volodymyr Yermolenko

Dr. Volodymyr Yermolenko is President of PEN Ukraine and Analytics Director at Internews Ukraine. A philosopher, journalist, and writer, he is Chief Editor of UkraineWorld.org and associate professor at Kyiv-Mohyla Academy, with publications in major international media outlets.



Denis Cenusă

Denis Cenusă is associate expert at the Centre for Eastern European Studies and Expert-Group think tank. Based in Germany conducting doctoral research, he specializes in democratization, geopolitics, and security in the post-Soviet and Eurasian space.



Ghia Nodia

Ghia Nodia is Professor of Politics at Ilia State University and founder of the Caucasus Institute for Peace, Democracy and Development. He served as Georgia's Minister of Education and Science and has published extensively on democracy and Caucasus politics.



Hans Gutbrod

Hans Gutbrod is Professor at Ilia State University, Tbilisi, and former regional director of the Caucasus Research Resource Centers. He has observed elections in Georgia since 1999 and holds a Ph.D. in International Relations from the London School of Economics.



Tefta Kelmendi

Tefta Kelmendi is Deputy Director for the Wider Europe programme at the European Council on Foreign Relations. Her research focuses on EU policies in the Eastern Neighbourhood and Western Balkans, particularly EU enlargement and democracy promotion.



Tamara Kovziridze

Tamara Kovziridze held senior positions in the Government of Georgia (2004-2012), including Deputy Minister of Economy. As a partner at Reformatics consulting firm, she has advised governments across Central Asia, Eastern Europe, Africa, and the Middle East on regulatory reforms.



Grigol Mgaloblishvili

Ambassador Grigol Mgaloblishvili is a career diplomat with twenty years in Georgian Foreign Service. He has served as Prime Minister of Georgia, Permanent Representative to NATO, Ambassador to Türkiye, and faculty member at the U.S. National Defence University.



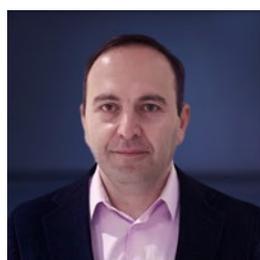
Eka Tkeshelashvili

Eka Tkeshelashvili is Distinguished Visiting Fellow at the German Marshall Fund and President of the Georgian Institute for Strategic Studies. Former Vice Prime Minister and Foreign Minister of Georgia, she led key Euro-Atlantic integration and justice reform initiatives.



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Tornike Zurabashvili is a researcher focusing on political and security affairs in Georgia and the Black Sea region. He holds a Ph.D. in Political Science from Tbilisi State University and extensive experience in development program management across Georgia, Ukraine, and Moldova.



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Miro Popkhadze is a Senior Fellow at the Delphi Global Research Center and a Non-Resident Fellow at FPRI. A former Representative of the Georgian Ministry of Defense to the UN, his work focuses on Russian foreign policy and Eurasian security. He is pursuing a Ph.D. at Virginia Tech.



Galip Dalay

Galip Dalay is a senior fellow at Chatham House and a doctoral researcher at the University of Oxford. His research focuses on Türkiye, the Middle East, Russian foreign policy, and relations with the West. His work has been published in outlets like Foreign Affairs and Foreign Policy.



Adina Revol

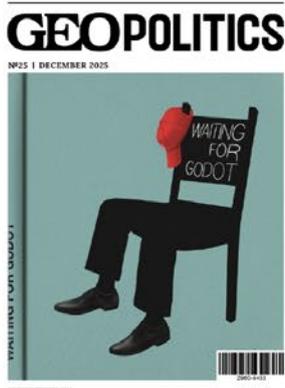
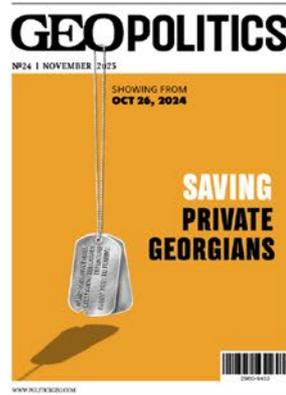
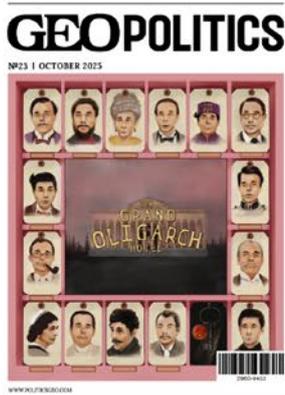
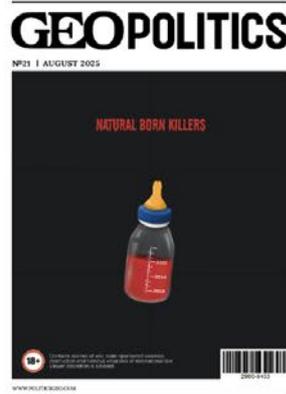
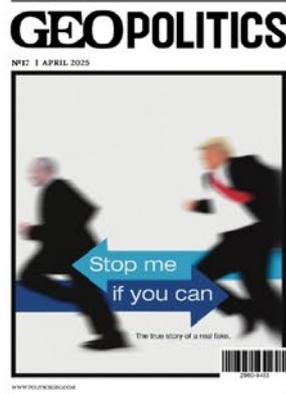
Adina Revol, PhD in Political Science from Sciences Po Paris, is a former spokesperson of the European Commission in France and author of *Breaking with Russia - Europe's Energy Awakening* (Odile Jacob, 2024). An expert on EU affairs, energy geopolitics, and Russia's hybrid warfare, she teaches at Sciences Po and ESCP Europe and frequently appears in French media.



Arsen Kharatyan

Arsen Kharatyan is the founder and editor-in-chief of Aliq Media. He advised Armenia's Prime Minister on foreign policy after the 2018 Velvet Revolution, worked at Voice of America and GIZ, and holds an MA in Islamic Studies and Arabic, with studies in Conflict Analysis and Resolution at George Mason University.

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