

The Window That Closed in Tbilisi Is Open in Yerevan

In April 2026, while receiving Nikol Pashinyan in the Kremlin, Vladimir Putin [told](#) his guest that membership in the Eurasian Economic Union (EAEU) and integration with the European Union are impossible to combine: “impossible by definition,” as he put it, and a matter of pure economics rather than politics. The courteous framing should deceive no one. Putin was informing Yerevan that the era of balancing has reached its end and that Russia planned to follow up on it. Bidzina Ivanishvili probably received the same message in a different form in 2022, when Russia’s full-scale invasion of Ukraine eliminated the space between accommodating the aggressor and partnering with the West.

Georgia’s ruling party has since chosen Russia. Armenia has so far resisted making the choice Moscow demands. Whether Yerevan and Pashinyan can sustain that resistance will determine if the West retains a strategic foothold in the South Caucasus.

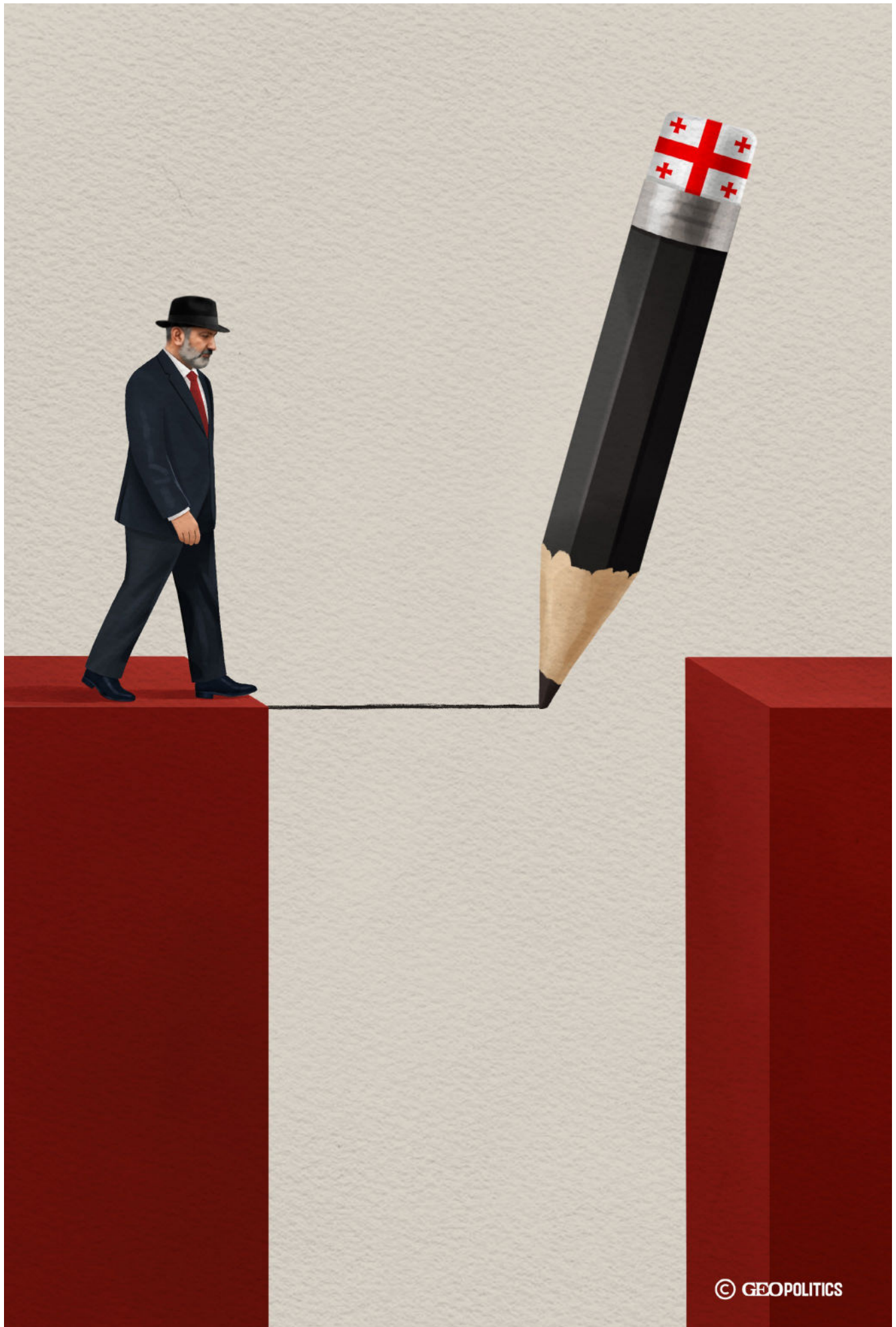
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For two decades, Georgia was the West’s most [dependable](#) partner in the wider Black Sea region. Its value and strategic weight in Brussels and Washington rested on two qualities: it was democratic and reliable. When Ivanishvili began promoting a diversified and multi-vectoral foreign policy after 2012, the project was an oxymoron, since dependability is precisely the asset that cannot be diversified. Ivanishvili understood that he was repositioning the country, and so did Western capitals. Yet hesitation was dubbed as pragmatic diplomacy, and Georgia was permitted to drift, decision by decision, from a Western stronghold into a state that now functions as a Russian vassal.



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That outcome should be read as more than a domestic political failure. It is a clear illustration of what happens to the geopolitical periphery when the West's power of attraction is left to run on the inertia of the post-Cold War moment.

Armenia now stands roughly where Georgia stood in 2003 and 2004. A reformist government has broken the hold of an entrenched, Russia-dependent elite, while public opinion increasingly favors a Western orientation. Yet Russian influence remains deeply embedded in the economy, the security sector, and parts of the political class. Such momentum does not last indefinitely. Georgia's experience showed both how much can be achieved and how completely the gain can be squandered.

The question, then, is whether Armenia can become the new foothold of Western interests in the region. Answering it requires addressing three related questions: Why did Georgia's turn toward the West prove reversible, and which mistakes by Georgians and their Western partners made it so? What do the similarities and differences between Georgia's position then and Armenia's position now reveal about the real vulnerabilities? And what must Yerevan, Brussels, and Washington do, concretely and in real time, to ensure that Armenia consolidates its momentum rather than repeats Georgia's trajectory? The answers matter beyond Armenia. Getting it right this time would restore credibility to the Western project across the region and strengthen the prospects of a democratic turnaround in Georgia itself.

The Two Revolutions

The clearest similarity between Georgia in 2003 and Armenia in 2018 is what the revolutions inherited. Both Saakashvili and Pashinyan took over weak states that were saturated with Russian influence, from appointed security officials and military bases to energy monopolies and elite networks cultivated over decades. Both moved quickly against corruption, and both delivered real, measurable results.

Georgia's transformation of the visible state remains one of the most [studied](#) anti-corruption episodes in the post-Soviet space: a police force rebuilt from scratch after the dismissal of tens of thousands of compromised officers, digitalized public services, and the dismantling of the entire informal economy of bribes, connections, and favors that had governed daily life. Armenia's velvet government produced its own early record, [dismantling](#) oligarchic monopolies, building new anti-corruption institutions, and registering rare democratic gains at a moment when democracy was retreating almost everywhere else in the region.

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The vulnerabilities are also shared, and they matter more. Georgia's reforms changed who controlled the central institutions inherited from the post-Soviet system, but not how those institutions exercised power. The judiciary remained subordinate to the executive—a failure Saakashvili himself [acknowledged](#). The reform process also produced serious abuses, most notably a zero-tolerance criminal justice policy that [increased](#) the prison population by 300 percent and generated resentment among a vast number of Georgian families. Ultimately, the courts, the prosecution service, and the electoral machinery were not made genuinely independent. They remained instruments of political power, ready to serve the next patron.

That next patron – Bidzina Ivanishvili – arrived with the backing of those who were affected by the reforms. Rooting out corruption stripped illegal income from influential layers of society, whether dismissed police officers and rent-seeking

bureaucrats or the criminal aristocracy of thieves in law. Their grievance was material rather than ideological. Ivanishvili's achievement in 2012 was that he managed to aggregate the dispossessed beneficiaries of the old order with the ordinary victims of punitive justice, wrapped both in the language of restoring fairness, and won a legitimate election.

What followed was the revenge of the post-Soviet elite. The networks that lost their income streams after 2004 recovered them after 2012 and are now part of the regime's operational core, [staffing](#) the loyal judiciary and clientelist apparatus around it. Georgian Dream is best understood as the restoration project of the pre-2004 order, financed by a Russia-made fortune, and the foreign policy reversal followed the same logic, [executed](#) against a public in which roughly three-quarters consistently identify as pro-Western and [support](#) EU membership has stood near 79 percent.

Armenia should avoid replaying the central Georgian failure at any cost. Pashinyan's long battle with the Constitutional Court ended with [compromise](#) judges tied to the former regime, and eight years into his rule, the prime minister [concedes](#) that the judiciary remains the country's least reformed institution. Meanwhile, the anti-corruption drive has [produced](#) high-profile prosecutions of former presidents and the billionaire Samvel Karapetyan that have yet to yield court verdicts. Some Armenian monitors [are raising](#) red flags about the use of state resources and law enforcement for political purposes and a deepening personalization of power. The Kocharyan and Sargsyan [networks](#) and the political movement around the Karapetyan family stand ready to aggregate discontented layers of Armenian society, and Moscow's task lies in finding this constituency its Ivanishvili.

Moscow's Levers and Armenia's Cleanup

Russia's hold on Armenia was never primarily about affection or ideology. It rested on a monopoly: only

Moscow could guarantee Armenian control over Karabakh while the country sat wedged between two hostile states. That monopoly is gone, and Russia destroyed it itself. When Russian peacekeepers stood aside during the 2020 war and again during the 2023 exodus of Karabakh's Armenian population, the strategic core of the alliance collapsed, leaving the machinery of dependence without the rationale that had justified it. The Kremlin drew its own conclusion. Armenia is no longer treated as a guaranteed ally; it is treated as another hybrid battlefield of Russia's [contest](#) with the West.

The machinery of dependence, however, remains formidable, and it is concentrated where Georgia's experience says it matters most: in the economy and in the elite. Armenia is still a member of the CSTO and the Eurasian Economic Union and still hosts Russian military infrastructure. Russia holds long-term [compromises](#) in Armenia's strategic sectors, including railways, nuclear power, natural gas distribution, and wheat supply. Giants such as Gazprom and Russian Railways continue to operate without restrictions. Alongside the economic chokepoints stands the political vehicle: the parliamentary opposition built around former presidents Kocharyan and Sargsyan, and the Our Way movement led by Narek Karapetyan, nephew of the jailed billionaire Samvel Karapetyan. Moscow [relies](#) on these forces to retain its influence. This is exactly the configuration Georgia's story warns about. Russia recaptured Georgia not through the military campaign in 2008, but through a billionaire, a grievance coalition, and institutions that had never been made independent. Russia does not need to garrison a country it can purchase, and it does not need to purchase a country whose resented, deeply polarized elites are ready to take it back on Moscow's behalf.

Yerevan understands the vulnerability and has begun the cleanup. Armenia's rearmament, which began after the 2016 Four-Day War exposed its dependence on Russian supply, has been [redirected](#) wholesale: [contracts](#) with India worth

more than 1.5 billion dollars in 2022 and 2023 and with France totaling at least 250 million dollars, alongside French military instructors and advisers inside the Ministry of Defense, and Indian-led training. The state has also moved against the most exposed asset of Russian-linked capital, nationalizing the power grid formerly owned by Samvel Karapetyan, and has [arrested](#) Karapetyan and two archbishops, Bagrat Galstanyan and Mikael Ajapahyan, on charges of attempting a coup. Moscow's reaction confirms what is at stake: Russian officials, including Sergei Lavrov, have [labeled](#) Armenian reform efforts destabilizing and Western-driven, the standard vocabulary the Kremlin applies to any neighbor attempting an exit.

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Two factors, however, can determine the limits of the cleanup. First, economic diversification has barely begun. Defense procurement can be redirected with a signature; gas infrastructure, railway concessions, and Eurasian union-related trade flows cannot, as Armenia's economic geography has always run northward towards Russia. Second, the coup cases against Karapetyan and the archbishops remain unproven in court, and a state that fights Russian influence with instruments that look selective risks manufacturing the very martyrs and grievances a revenge coalition needs. Georgia's reformers made that mistake with their own justice system, and it cost them the country.

Russia's leverage over Armenia was always a [function](#) of Armenian insecurity. The peace and normalization with Azerbaijan and Türkiye correlate directly and inversely with Moscow's chances

of restoring control. Every reopened border crossing and every eastward or westward trade route devalues the northern chokepoints. The Kremlin knows this arithmetic as well as anyone, which is why spoiling the normalization process is now the cheapest and most obvious play available to it, whether through its clients in the opposition, through the church conflict, or through engineered instability timed to Armenia's elections. The key question now is whether the West is prepared to underwrite the one thing it has historically refused to touch and Russia can still credibly threaten: Armenia's security.

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Will the West Return?

Western interest in the South Caucasus has a simple geography. The Middle Corridor, the trade route linking Central Asia to Europe across the Caspian while bypassing Russia and Iran, runs through this region. Or it does not run at all, and every disruption of the corridor is a gift to Moscow's northern chokepoints. A stable and reliable South Caucasus is therefore a strategic requirement for the West rather than a philanthropic preference. Reliability, as Georgia's regression [demonstrated](#), is a quality only a partner anchored in Western structures can provide. For most of the past decade, the West's regional position was eroding: Georgia captured, Azerbaijan transactional, Armenia locked in Russia's security architecture. What has changed since 2025 is that Washington, for the first time, has placed material stakes on the ground in Armenia.

The centerpiece of this interest is the Trump Route for International Peace and Prosperity (TRIPP). Following the August 8, 2025 White House summit at which Pashinyan and Aliyev [initialed](#) a peace

agreement and committed to the connectivity deal, the United States and Armenia moved with unusual speed: an implementation framework [published](#) in January 2026 and a framework agreement [initialed](#) in Yerevan in May, alongside a renewed Charter on Comprehensive Strategic Partnership and a critical minerals memorandum. The structure of the deal matters more than its name. The [route](#) crosses 43 kilometers of Armenian territory along the Iranian border, remains under Armenian law and Armenian border control, and is developed by a joint [TRIPP](#) Development Company in which the United States holds a controlling stake for decades. By placing American commercial interests physically on the most sensitive strip of land in the region, the arrangement converts the corridor from a pretext for coercion into an asset the United States has a direct financial reason to protect.

Between January 2025 and early 2026, Armenia assumed control of its border checkpoints from Russia's FSB troops. The transition began at the Karchevan crossing on the Iranian border, continued at Zvartnots Airport and the Margara and Akhurik checkpoints along the Turkish frontier, [ending](#) a border-control arrangement established by the 1992 Armenia–Russia border-guard treaty. The Russian 102nd Military Base in Gyumri and the Meghri border detachment, however, remain unresolved remnants of that system.

For TRIPP, this sequence was a prerequisite, not a coincidence. The proposed route passes through Meghri along the frontier that the FSB guarded for three decades. A corridor operating under Armenian law and involving a controlling American stake could not realistically have been built across a border controlled by Russia. Removing the FSB from Armenia's south was therefore the project's quiet enabling step, while Moscow's remaining military presence in Gyumri now represents its last significant physical lever inside the country.

The technology track follows the same logic. Firebird's AI infrastructure project, born of the semiconductor and artificial intelligence memorandum [signed](#) alongside the August 2025 peace documents, has [grown](#) from a 500 million dollar first phase into a 4 billion dollar second phase [announced](#) during Vice President J.D. Vance's February 2026 visit to Yerevan, with a U.S. export license covering tens of thousands of NVIDIA GPUs. Export licenses for advanced chips are instruments of strategic trust that Washington extends to very few states, and their extension to a CSTO member hosting a Russian base would have been unthinkable three years ago. The European track has thickened in parallel: the EU [established](#) a new civilian mission in April 2026 to strengthen Armenia's resilience, Yerevan hosted the European Political Community summit on May 4 followed by the first EU–Armenia summit on May 5, and the sides launched a 200 million euro partnership with Global Gateway investments projected to reach 2.5 billion euros.

This is a different quality of engagement than anything Georgia ever received since the U.S.-backed and BP-led multi-billion BTC pipeline [project](#) was announced in the mid-90s and the massive GTEP U.S. military capacity-building [program](#) in the early 2000s. The difference goes to the heart of what went wrong in Tbilisi. The West invested two decades of funding, conditionality, and narrative in Georgia while declining to touch the problems that actually [determined](#) the country's fate: the occupied territories, the security vacuum after 2008, and the fear, patiently cultivated by Moscow and later voiced by Georgian Dream, that Western alignment purchases war while accommodation purchases peace. Brussels asked Georgia to perfect its regulatory alignment; nobody underwrote its security. Ivanishvili built his entire repositioning on that gap. The current engagement with Armenia, whatever its motives and however transactional its architecture, addresses the gap directly, because peace with Azerbaijan and Türkiye removes the existential threat that made Russia's protection racket

function, and American assets on the ground raise the cost of the destabilization scenarios Moscow would otherwise reach for first.

Two unaddressed fundamentals remain: first, none of this yet amounts to a security guarantee, and Armenians remember that paper commitments failed them recently. Commercial deterrence works only while the assets matter to Washington. The durability of an engagement branded so personally around the current president is a legitimate question for any Armenian planner. Second, the engagement is conspicuously government-centric. Summits, corridors, and data centers consolidate a state's orientation; they do not by themselves build independent courts, credible elections, and resilient institutions that determine whether that orientation survives a change of government. Georgia had the reverse problem: institutions were engaged, but security was completely ignored. Repeating the error in mirror image, security engaged and institutions ignored, would reproduce the same vulnerability by a different route.

Lessons in Real Time

Georgia's turn toward the West proved reversible because the revolution changed who ran the post-Soviet state, but not how the state itself worked. Courts, prosecutors, and electoral institutions remained subordinate to the executive. They were simply waiting for a new master. At the same time, the reforms created a large and angry constituency that had both the motive and the material interest to support one.

At the 2008 Bucharest summit, NATO promised that Georgia would eventually join the alliance but withheld the Membership Action Plan that might have made that promise credible. The result was the worst of both worlds: Moscow was provoked, and Tbilisi was left unprotected.

The West never quite decided what Georgia was supposed to become. At the 2008 Bucharest summit, NATO promised that Georgia would eventually join the alliance but withheld the Membership Action Plan that might have made that promise credible. The result was the worst of both worlds: Moscow was provoked, and Tbilisi was left unprotected. For the next two decades, Georgia remained in Europe's waiting room—close enough to keep its hopes alive, but far enough away to spare the West any firm obligation.

Western governments funded reforms, monitored progress and issued regular assessments. But they kept postponing the two questions that matter most to a small, vulnerable state: Who will protect us, and will we be abandoned when the danger comes?

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After the 2008 war, that uncertainty shaped everything. Moscow never had to persuade Georgians that Russia offered a better future. Its argument was simpler: the West will not fight for you, while Russia will always be next door. No association agreement could answer that. Ivanishvili built his system in the space where a convincing answer should have been.

What does this trajectory reveal about where Armenia's real vulnerabilities lie? In the same three places, with one variable inverted. The judiciary [remains](#) the least reformed institution in the country. The resentful constituency is assembling, from displaced officials and prosecuted magnates to an aggrieved church hierarchy, and Moscow's political vehicles stand ready to aggregate it. And the economic chokepoints, from gas distribution to railways, [remain](#) in Russian hands.

The inverted variable is the security equation. Georgia's reformers faced a Russia willing to invade and a West unwilling to engage the consequences; Armenia's reformers face a Russia that has already forfeited its guarantor role and a West that has finally [placed](#) material stakes on the ground. Armenia's window is real. It is also the same window Georgia had between 2004 and 2008, and Georgia's window closed by force, the force Russia can no longer afford after its strategic disaster in Ukraine.

Small states under Russian pressure need real help in real time on the problems that actually threaten them.

What must be done follows from the diagnosis, and the guiding principle is the one Georgia's experience should have taught a decade ago. Small states under Russian pressure need real help in real time on the problems that actually threaten them. Conditionality that withholds engagement until internal transformation is complete gets the sequence backward, because Russia does not wait for the results of judicial vetting. Telling Armenia to become Switzerland before the West will invest in its survival repeats the Georgian error with different vocabulary. The right sequence starts with the largest and most uncomfortable problems, security and economic dependence, and builds institutional demands on that foundation rather than in place of it.

For Washington, this means treating TRIPP and the technology partnership as the opening of a security relationship rather than its substitute. The United States and its partners should expand military assistance, advanced training, and access to dual-use technologies to consolidate Armenia's realignment, and should state plainly that destabilization of Armenia would carry costs for Moscow. Implicit deterrence is deterrence Moscow will test. For Brussels, it means matching the 2.5 billion euro Global

Gateway [ambition](#) with the unglamorous work of breaking Russian economic chokeholds: alternative energy routes, transport links westward and southward, and targeted investment in the sectors where Russian concessions currently give Moscow its quiet veto. For Yerevan, the assignment is the one Georgia's reformers failed: finish the state. An independent judiciary and credible elections are what make a Western orientation irreversible, because they remove the possibility that the next Ivanishvili inherits a captured machine.

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Can Armenia become the new foothold of Western interests in the region? It can, but under a clear requirement: the frontline between Russian and Western influence in the South Caucasus runs through the quality of democratic institutions, and no other terrain will decide the contest. Democracy may be in retreat globally, but in this region the contest for influence is not fought over trade balances or ideology; it is fought over whether states can be captured. Russia's method requires dependent courts, purchasable elites, and societies governed by fear. Every institution that becomes genuinely independent is territory Russia loses permanently. That is why getting Armenia right matters far beyond Armenia. A consolidated, secure, Western-anchored Armenia would demonstrate to Georgians, who remain overwhelmingly pro-European under a regime working to make their preference irrelevant, that the exit from Russia's orbit exists and stays open. Georgia was lost gradually, through hesitation dressed up as pragmatism. Armenia will be kept, or lost, the same way, and the decisions are being made now ■