



# Metis

## Study

**Will there finally be “peace”  
in the South Caucasus?  
Azerbaijan, Armenia and the  
geopolitical prospects of the  
new post-Karabakh order**

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# Summary

The “lightning offensive” launched by Azerbaijan against the majority Armenian (Nagorno-)Karabakh province in September 2023 resolved the question of territorial integrity and sovereignty in favour of Baku while changing the region’s long-term geopolitical orientation to the

disadvantage of Armenia and Western stakeholders. Nevertheless, the West may continue to play an important role in the region – but only if its representatives figure out their own genuine interests and increase their material commitment substantially.

## New geopolitical situation

In 2020, the 44-day war between majority-Muslim Azerbaijan and the Christian Orthodox Nagorno-Karabakh Republic, located on Azerbaijani territory but still de facto independent at the time and home to a predominantly ethnic Armenian population, created new geopolitical realities. The war changed the region’s balance of power and alliances, expanded the circle of players present in the South Caucasus, and, not least, produced clear winners (Azerbaijan) and losers (Armenia and the people of Nagorno-Karabakh).<sup>1</sup> And yet, although the changes were substantial, they were not permanent as a potential reversal of the new realities, power relations, dynamics and players as well as a return to the status quo ante still seemed possible.<sup>2</sup>

That changed with Azerbaijan’s so-called lightning offensive on 19 and 20 September 2023, which resolved the issue of Azerbaijan’s territorial integrity as well as the national affiliation of Nagorno-Karabakh – thoroughly and in favour of Baku. Also, the geopolitical orientation of the region and the associated normative and power dynamics were redefined more precisely. What remains less clear, however, is both Armenia’s role in the region in the medium

and long term as well as the roles of Germany, the European Union and other Western stakeholders for the time to come. The objective of this analysis is to shed light on these issues.

## The “lightning offensive” (2023)

Baku’s attack on Nagorno-Karabakh, then still under Armenian administration, started as an “anti-terror operation” on 19 September 2023. It came in response to a landmine explosion that killed six people (four Azerbaijani soldiers and two civilians) and was attributed to the military arm of the Nagorno-Karabakh separatist movement. According to the Azerbaijani Ministry of Defence, the objective of the “lightening offensive” was to destroy the military capabilities and the political presence of the Nagorno-Karabakh Republic, which had never been internationally recognised.

From Baku’s point of view, the offensive was a complete success: after just one day, it led to the surrender of the de facto government and a promise to dissolve Armenian Artsakh by 1 January 2024. It also led to an immediate mass exodus of the civilian population to neighbouring Armenia. Just a few days after the end of the offensive, almost 90,000 people (from a total population of about 100,000) had crossed the border to Armenia, with thousands more to follow in the weeks afterwards. While this led to international accusations that Baku was guilty of expulsion and ethnic cleansing, it also made the integration of the previously autonomous and not majority Azerbaijani province into the heartland much easier – and thus a Baku-dictated peace much likelier.

<sup>1</sup> Nagorno-Karabakh is the Armenian name of the region, but the historical name of Artsakh has officially been used since 2016. The Azerbaijani name is Karabakh.

<sup>2</sup> See “Peace in sight? Armenia, Azerbaijan and the Nagorno-Karabakh conflict”, Metis Study No. 30 (November 2022).



All in all, the “lightening offensive” marked Armenia’s final defeat. In this context, the surrender had an important psychological component: the loss of centuries-old Armenian life in Nagorno-Karabakh and thus also, in some respects, of significant constituents of Armenian national identity, which is closely linked to the province’s intellectual and cultural heritage. Also, it had a very tangible, material component. This defeat further exacerbated Armenia’s economic and political isolation since 2020 and marked the end of the old post-Soviet order in the South Caucasus – with Russia as the hegemonic power and Armenia as its close, loyal ally.

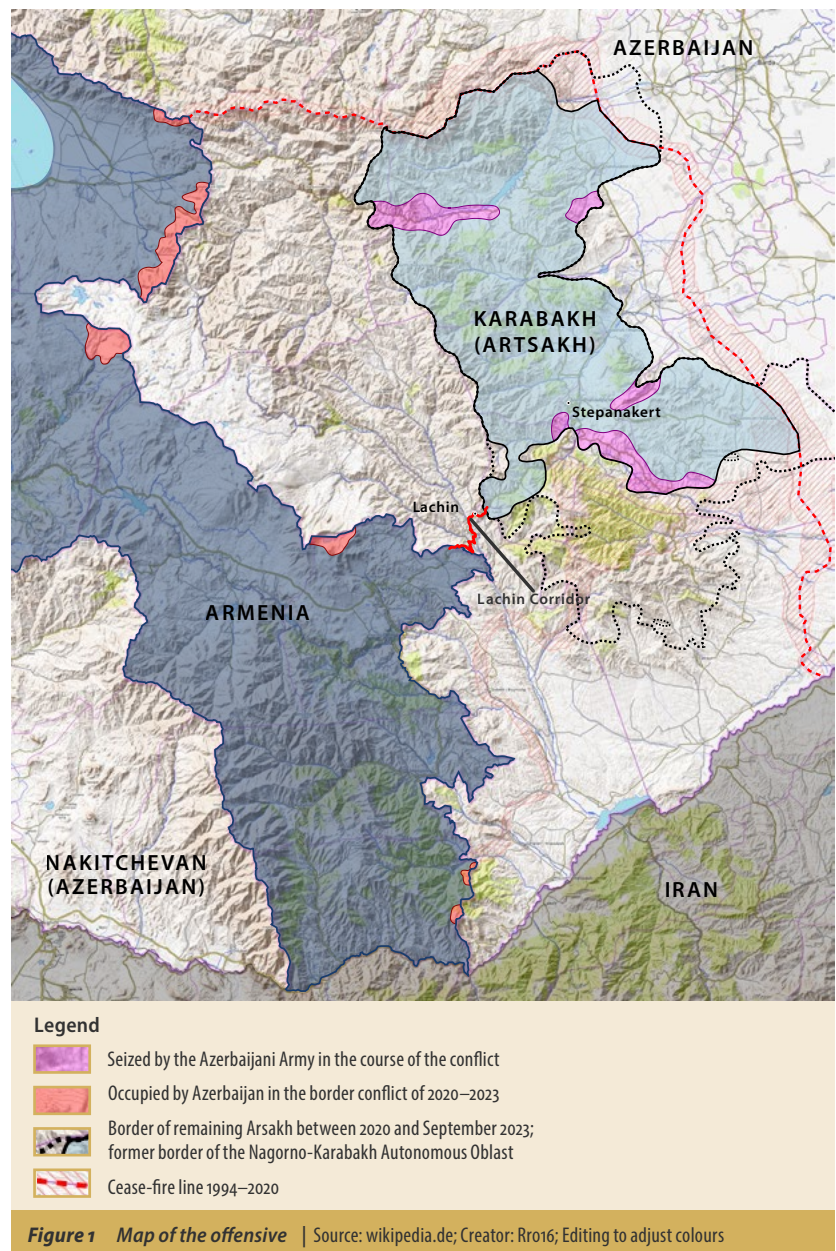
### Why a military offensive?

On the face of it, the military conquest of Karabakh by Azerbaijan seems counterintuitive. Since late 2022 and especially in the spring of 2023, the parties to the conflict had already used various multinational dialogue formats with Russia, the US, and the EU to engage in peace negotiations with one another. These focused primarily, though not exclusively, on the future status of the (Nagorno-)Karabakh province. It was Armenia’s Prime Minister Nikol Pashinyan who set the tone of these negotiations. He explicitly recognised Azerbaijan’s territorial integrity and sovereignty over Karabakh and, since the defeat in 2020, had been actively preparing the Armenian population for the imminent material and ideational abandonment of the province. From his perspective, there did not seem to be a genuine alternative option because of the country’s economic and military weakness and its regional isolation.

Regardless of Yerevan’s support, moreover, the de facto government in Stepanakert was not in a position to ensure any kind of stability in the province, as it had to deal with an Azerbaijani-made humanitarian disaster – a dramatic shortage of food, medicine, fuel and almost all other essential goods that evolved due to Baku’s blockade of the Lachin corridor. This corridor was the only connecting road between Karabakh and Armenia for all traffic except convoys of the Russian peace contingent and the Red Cross, and its blockade since 2022 was in breach of the 2020 peace agreement

negotiated by Moscow because it effectively thwarted all transport between Karabakh and Armenia, even in medical emergencies. Accusing Yerevan of concealed arms shipments into the province, Baku used the blockade to cement its improving position, isolating Karabakh and further demoralizing the Armenian government.

In these circumstances, a short and effective military offensive seemed strategically more sensible than continued multilateral negotiations. From Baku’s perspective, none of the three formats accurately represented Azerbaijan’s strategic advantage on the ground. Indeed, in terms of negotiations, Baku and Yerevan were actually in a stalemate situation:





even though Karabakh’s re-affiliation with Azerbaijan was already decided upon, the political status of the majority Armenian province was still to be negotiated, as were the living conditions, rights and freedoms of the local civilian population. The dialogues also dealt with topics far less “interesting” to Baku, such as the still outstanding demarcation of the Armenian-Azerbaijani border and the return of the areas occupied by Azerbaijan on Armenian territory since autumn 2022. Any attempt to interlink topics as part of the negotiations thus had the potential to torpedo or at least considerably delay the practical political implementation of everything the Azeri government had already achieved on the ground.

The military offensive, on the other hand, quickly turned future possibilities into present realities without the costs associated with further negotiations. Against this backdrop,

both the military offensive and the blockade of the Lachin corridor may be considered a preparation for an “efficient” integration of Karabakh into the heartland – and thus as preparation for a lasting regional “peace” according to Baku’s liking.

### Regional implications

#### Azerbaijan

After more than 30 years of unclear status, the sovereignty of post-Soviet Azerbaijan over the Karabakh province has been established for the first time since the country’s independence, thus achieving the priority and most pressing objective pursued by Ilham Aliyev’s government for more than two decades. And yet, whether the effective “Azerbaijanisation” of Karabakh will bring lasting peace to the region still remains to be seen.



**Figure 2** Borders of the Syunik region | Map: OpenStreetMap contributor; Source: Media reports, <https://datarapper.dwdn.net/p8pcE/1/>; Edited to adjust colours



The battle against the Armenian occupation of the province has been ongoing since the Soviet era and, as such, it has taken on too important a role for it to be abandoned. Since the country's independence, Aliyev's pathway towards Azerbaijan's "territorial integrity and justice" was at the core of the country's post-Soviet national identity and thus a mobilising instrument to unite the at times rather dissatisfied Azerbaijani public. In this regard, a victory and thus the loss of the "Armenian enemy" may prove problematic, as it is a key pillar of Azerbaijan's self-understanding – without it, central aspects of the country's national identity collapse, with potentially serious consequences for the nation's internal stability and its capacity to take action in matters of foreign policy.

It is therefore not surprising that the end of the Karabakh conflict goes hand in hand with a more intense debate on another region on Armenian territory which Baku considers to be of traditional Azerbaijani heritage and belonging: the Syunik province, or Zangezur in Azerbaijani, and now "Western Azerbaijan", according to Aliyev. Located between Azerbaijan's recently blocked Lachin province in the east, the Azerbaijani exclave of Nakhchivan in the west and Iran in the south, Syunik is the southernmost region of Armenia and has one of the country's few borders that are open to trade and transit: the border with Iran. Syunik's role as a transport corridor between Karabakh and Nakhchivan was already established in the 2020 Azerbaijani-Armenian ceasefire agreement; Armenia was to guarantee the security of transport routes between the western territories of Azerbaijan and Nakhchivan Autonomous Republic and to ensure unrestricted passenger, road and freight traffic. To Ilham Aliyev, this opened the door to put a claim on the establishment of an Azerbaijani-controlled "Zangezur Corridor", and thus on the establishment of "Western Azerbaijan" on Armenian territory. Even after the recapture of Karabakh, Baku can thus maintain its political continuity with regard to the nation's traditional enemy around which it builds its identity.

The domestic purpose of ideational revanchism goes hand in hand with geopolitics of regional and even global extent. This is because the Syunik region, connecting Azerbaijan with Nakhchivan and also with Nakhchivan-bordering Turkey, is of substantial geostrategic value. If Baku were able to force through its idea of the "Zangezur Corridor" as desired, a land bridge and thus transport route between Central and West Asia, previously interrupted for more than a century, would be established with access to the Mediterranean and with the potential to become a new main transport route for the "Middle Corridor" of China's Belt and Road Initiative (BRI).<sup>3</sup> At present, the question of the

development of such a "Turkic vein" connecting Azerbaijan and Turkey as "two parts of one nation" is of great political interest to China, the EU and other countries in between, because of both the de facto closure of the BRI's "Northern Corridor" via Russia as well as the shorter transport times compared to transport via the Indian Ocean. It thus makes sense that Azerbaijan redirected its attention towards Syunik to maintain its revisionist discourse which laments the "annihilation of Azerbaijani life in Syunik" and the "expulsion of the traditionally Azerbaijani population" by Armenia, and thus legitimises Azerbaijani control over parts of Armenian territory. Azerbaijan's domestic stability and the expansion of its regional power go firmly hand in hand.

### Armenia

Since the lightning offensive, Yerevan's political power has decreased dramatically and the country has become largely isolated in the region (with the exception of neighbouring Georgia). In fact, the total defeat of Armenia was not just military, sociopolitical and identity-political in nature, it was also a diplomatic defeat: Yerevan lost its last genuine partner of regional significance – Tehran. Since 2020, the Iranian government had been actively working to suppress the "Azeri-Turkish axis" in the region and supported Yerevan with the relevant diplomatic and economic means.<sup>4</sup> With the loss of Iranian support, Armenia lost the last opportunity to try to establish a countervailing power against Baku and Ankara at the regional level. While there are many reasons for this loss, the most serious one is the long-term political-normative and military orientation of the country's government towards the West. Earlier, this strategic decision already removed Moscow from the list of Armenia's supporters; more recently also Iran.

In fact, Armenia's defeat in the 44-day war and the re-configuration of regional power relations can be traced back to Yerevan's "Velvet Revolution" in 2018, during which Nikol Pashinyan, who was politically (more) liberal by regional standards, came to power. Moscow had criticised its ally's government in the run-up to the 44-day war and has since taught it lesson after lesson by not rendering military support in spite of Baku's aggression.<sup>5</sup> Thus, Armenia's "protective power" Moscow has called on both sides to exercise moderation in all cases of Azerbaijani aggression since 2020 – even when Baku did attack actual Armenian territory (for example in the Syunik region) in autumn of 2022, which constituted an effective alliance case. Moreover, Moscow also failed to protect the Armenian population in Karabakh before and during the lightning offensive in clear violation of its own mandate.

<sup>3</sup> The "Middle Corridor" currently runs from the People's Republic of China via the post-Soviet countries (of Turk origin) in Central Asia, the Caspian Sea, Azerbaijan and Georgia to Turkey and further to Europe.

<sup>4</sup> See "Peace in sight? Armenia, Azerbaijan and the Nagorno-Karabakh conflict", Metis Study No. 30 (November 2022).

<sup>5</sup> Armenia is a member of the Collective Security Treaty Organization (CSTO), a Moscow-led military alliance in the post-Soviet area.



Not least, Russian peacekeeping forces also failed to intervene during the blockade of the Lachin corridor as well as during Baku’s anti-terror operation. Moscow can thus be considered an accomplice in the de facto expulsion of the Armenian civilian population from Karabakh.

Moscow’s politically motivated passivity did not, however, force an antiliberal, Moscow-friendly political change in Yerevan. Instead, it encouraged President Pashinyan to intensify his rapprochement with the West. Armenia joined new EU cooperation and investment formats, opened up to new mediation formats offered by Brussels and Washington, and, not least, accepted Western security and military support despite strong protest from Baku and Moscow.

For instance, in early 2023, the European Union Mission in Armenia (EUMA) was established against Baku’s will in six Armenian towns near the Azerbaijani border (two of them in the Syunik province). Its mandate is to monitor the security situation in the area and thus to contribute to the protection of the Armenian civilian population and confidence building between the parties to the conflict. This mission is headed by Markus Ritter of the German Federal Police, who has previously served as the head of mission in Kosovo, Afghanistan, and South Sudan and is familiar with the problem of external attacks on fragile states and may therefore be considered of particular value to the Armenian government.

While still a formal member of Moscow-led CSTO, Yerevan has been actively seeking bilateral and multilateral military cooperation with the US. To this end, in September 2023, the government allowed for the first time for a bilateral US-Armenian military exercise, the Eagle Partner 2023, to be held on Armenian territory. The objective of the exercise was for US peacekeeping units to train Armenian national armed forces, to exchange best practices of control and tactical communication, and thus to effectively prepare the upcoming evaluation process for the NATO Partnership for Peace Operational Capabilities Concept. Not surprisingly, the exercise effectively resulted in a symbolic punishment of Yerevan by the other regional powers: Moscow voiced heightened threat perceptions, condemned the exercise as creating an anti-Russian springboard in Transcaucasia and explicitly made reference to Ukraine’s fate in this context. Angered by the crossing of a red line, Tehran also took action and withdrew its active support, rendering the country now ostracised in the whole region. This, in turn, created the window of opportunity for Baku to successfully conduct the lightning offensive during the bilateral exercise: the final day of Eagle 2023 coincided with the capitulation of Karabakh and the start of refugees leaving the region.

Since then, Armenia’s government has made even more efforts to diversify its old ties with the regional powers. It has not only voiced great doubts about the purpose of the Russian military base in Gyumri but has also expressed an interest in closer cooperation with NATO, be it in the context of exercises or arms shipments. Yerevan has already begun to buy weapons from France. In late October, then, Yerevan

signed an agreement on the purchase of three air defence radar systems (GM200) and a declaration of intent on future deliveries of short-range air defence systems (Mistral).

### **The new geopolitics of the South Caucasus**

The most important consequence of the newly created “peace” in Karabakh is Armenia’s ostracism in the region as well as the consolidation of an autocratic axis between Moscow, Baku, Tehran and Ankara. This mix carries the risk of further regional destabilisation, as Baku’s appetite has not been satisfied yet. In fact, Ilham Aliyev is expected to use the momentum of his easy victory over Karabakh and Armenia’s overall difficult situation to assert further territorial claims and political objectives – both to ensure regime security and stabilize national identity as well as to consolidate its international position as a geostrategically significant trade hub. In this regard, the objective of retaking “Western Azerbaijan” and expanding the “Zangezur Corridor” is key; the country’s ontological security and associated domestic functions and geopolitical advantages can thus be ensured as a follow-up to Karabakh.

So far, Tehran and Yerevan have been blocking the implementation of this vision, as Azerbaijan’s control over Syunik would de facto deprive both states of their common border. Yet now, Baku and Tehran have come to jointly develop an alternative solution that is acceptable and geopolitically advantageous to both parties, while excluding Yerevan: a transport corridor roughly parallel to the Soviet-built but barely intact “Zangezur infrastructure” is now being built on the Iranian side. This provides Azerbaijan with a direct (though not exclusively Azerbaijani-controlled) connection to Nakhchivan and thus to Turkey. For Iran, this “Zangezur alternative” is an opportunity to have both a say and a share in the profits of the highly lucrative transport corridor while maintaining their own border with Armenia. This option also allows both actors to benefit from the connection to the Moscow-supported North-South corridor, which will provide Russia, now sanctioned by the West, with new trade routes to the Indian Ocean via Azerbaijan and Iran. This solution renders Azerbaijan and Iran hubs of regional connectivity, both along the North-South and East-West axes, with land bridges between Russia and the Arabian Sea as well as between China and the Mediterranean. Especially for internationally sanctioned Tehran, the new connectivity options are a geopolitical and economic jackpot, which have consequently been praised by the local press as “Iran’s new oil”.

Another substantial beneficiary of the order that developed in the wake of the lightning offensive is Turkey. Ankara is the driving force behind the “Turkic vein” connecting the countries of Central Asia to Turkey via Syunik (which Turkish authorities also call “Western Azerbaijan”), as it would ultimately be controlled by Ankara, the most powerful actor in the pan-Turkic world and the most important geographic hub between Asia and Europe after Russia.



In addition to substantial economic profit, the “vein” would offer Turkey significant geostrategic relevance extending far beyond the South Caucasus and thus provide opportunities to establish countervailing power against Beijing, Moscow and Western actors, not to mention the regional states. Even though this option is still a long way off, the new post-Karabakh reality is the first step in its direction and thus also in the direction of satisfying Ankara’s post-imperial pursuit of major power status, authority and autonomy in the international system.

Moscow, on the other hand, cannot be considered a real beneficiary of the new regional order, as the now clearly evident loss of former regional hegemony weighs too heavily. Nevertheless, the new geopolitical situation offers Moscow the least bad option. Russia condemned Armenia’s cooperation with the West and severely punished the disloyal government in territorial, social, ideational, sociopolitical and, not least and significantly, economic terms. At the

same time, Turkey has not been able to further expand its influence at the expense of Moscow since the offensive. Instead, Baku and Ankara have had to rely on the traditionally conflict-ridden relationship with Tehran to enable a direct transportation link between Azerbaijan and Turkey. Born out of necessity, the new cooperation format provided the ideal basis for Moscow to continue its mediation activities in the region beyond the Karabakh problem, thus maintaining its role as Eurasia’s peace and power broker for the time being.

Not least, due to the increased isolation of Western-oriented Armenia, the new post-Karabakh order strengthens the autocratic character of the region, which is Moscow’s most vital interest. The new order is intended to deliberately shield the South Caucasus and its neighbouring countries from the West – from its alliances and organisations, its political and security orders, its attempts to mediate, and thus ultimately, from its power.

Figure 3 Regional context of the South Caucasus | Map: © SIMPLYMAPS.de; translated to English, edited to include labels, colour highlights, approximate corridor routes





This is also reflected in the 3+3 format, which was introduced by Moscow in 2021 to bring Russia, Iran and Turkey together with the three republics of the South Caucasus so as to establish a regionally negotiated (and hence non-Western) peace order, which would resolve problems between Armenia, Azerbaijan and the regional powers.<sup>6</sup> And indeed, in the aftermath of the lightning offensive, this platform has been the only institutional format in which Baku and Yerevan have been communicating at all.

### New order, new problems: recommendations for Germany and the EU

*Do not play this game with Armenia: Is it Russia's or the West's? – Please don't play that game. That game is OK for you, but it's a threat for us.*

Head of an NGO in Syunik, Armenia, October 2023<sup>7</sup>

For Western countries that are involved in the conflict and benefit from transit links and trade relations with the region, the new “peace order” in the South Caucasus entails a great responsibility, especially for Armenia. In fact, the current fate of Yerevan is a direct result of the country's orientation toward the West. And so, mediators from Washington, Brussels and Paris should not only prioritise the protection of Armenia's territorial integrity and sovereignty but also focus on ending the isolation of the post-Soviet Republic and integrating it into regional and supraregional connectivity projects – aspects closely connected to the country's security situation.

The EU does have instruments that can not only influence Baku's conduct towards Yerevan but also reduce the vulnerability of the latter in an antagonistic environment. In this regard, the European Union's economic power – the size of the single market, the range and integrative potential of the bloc – constitutes the most significant leverage. The EU27 is not only by far the most important trading partner of Baku, with Azerbaijan earning more than 50 percent of its total trade volume from trade with the EU, but also the largest investor in the country with a total of almost EUR 7 billion. As part of the EU Economic and Investment Plan and in cooperation with the European Investment Bank (EIB) and the European Bank for Reconstruction and Development (EBRD), Brussels is also committed to helping Baku mobilise another EUR 2 billion to support the sustainable socio-economic development of the country. Not least, the EU is the most important starting and destination point for

Eurasian connectivity projects, from which Azerbaijan, a transit country, has thus far been profiting to a considerable extent and wishes to continue to do so.

Due to the high economic added value for Azerbaijan, Europe's economic power could thus potentially have a moderating effect on Baku's offensive conduct and in this way significantly improve Armenia's position in the region – if Brussels and the member states agree to use their strength to protect Armenia. In this regard, even a suitable instrument to provide information on Baku's conduct on site would be available in the form of EUMA. The mission can generate valuable linkage effects between Armenian security and Azerbaijani economic development – as a tool shedding light on Baku's respect for Armenia's territorial integrity and sovereignty on the one hand and promoting economic cooperation between Azerbaijan and the EU on the other.

Another possibility for the EU to support Armenia is the Resilient Syunik Team Europe Initiative, which is part of the EU Economic and Investment Plan for Armenia worth a total of EUR 2.6 billion and aimed at strengthening the geostrategically relevant and contested region of Armenia from within. Similar to efforts focused on Azerbaijan, the focus is on promoting the development of sustainable socio-economic and institutional structures. The EU member states and Switzerland are involved in this initiative, as is the European Investment Bank (EIB). The initiative explicitly focuses on Armenia's most important and most vulnerable region in the current geopolitical context and has a clear objective in terms of development and security policy: improving socio-economic structures and thus increasing resilience on Armenian territory, including against “pan-Turkic activism”. There is plenty of room for improvement in terms of funding and the creation of geopolitical weight, however, as, this initiative has a comparatively low budget of EUR 116 million for a period of five years – at least when compared with Brussels's commitment for Baku.

These complementary approaches – monitoring Baku's conduct on Armenian territory while strengthening Armenia's economic, sociopolitical and institutional aspects – will contribute to the improvement of Armenia's resilience, but they only partially solve the problem of the country's regional isolation and the associated structural insecurity. What Armenia needs in order to genuinely and sustainably protect its territorial integrity and sovereignty is a solid, long-term opportunity to integrate into regional and supraregional connectivity structures. This integration begins with the complete opening of its borders with Azerbaijan and Turkey, followed by the promotion of trans-regional infrastructure development, for example as part of the European Global Gateway Initiative, TRACECA and other programmes in connection with the European Neighbourhood Policy, as well as non-European initiatives such as China's Belt and Road Initiative (which is difficult to separate from many EU-oriented infrastructure projects anyway).

<sup>6</sup> Georgia still refuses to participate in this format.

<sup>7</sup> Joshua Kucera: “In Southern Armenia, Global Powers Move in Amid Fears of A New Azerbaijani Offensive”. Radio Free Liberty, 4 November 2023. Accessed on 10 November 2023: <https://www.rferl.org/a/armenia-syunik-region-azerbaijan-russia-iran-united-states/32671001.html>.



In short, there are different ways in which Western stakeholders can make an extremely valuable contribution to Armenia’s sovereignty and territorial integrity and thus to the security of the local civilian population and the development efforts of the country. However, this presupposes fundamental decisions on the goals the EU wishes to pursue in this region. Put differently, what is more important, supporting Armenia or punishing Russia in the context of the war in Ukraine and reining in the Moscow-Tehran axis?

In other words, would the EU continue to promote the development of geostrategically important transport routes in Armenia even if these were to benefit Russia and Iran as part of the currently emerging North-South corridor and thus to help Moscow circumvent the sanctions currently in place? Would the EU further continue to purchase energy sources from Baku and promote Azerbaijan’s role as a strategically relevant transit country, thus strengthening the country’s economic and military capabilities and its potential for aggression against Yerevan, just to maintain the sanctions against Russia and to reduce the EU’s own energy dependency on Moscow? Not least, would Brussels follow Ankara’s policy of ostracism against Armenia in order to maintain NATO’s unity (and its enlargement objectives) with regard to Russia and the BRI’s “Middle Corridor”, which is intended to compensate for the loss of the northern East-West connection via Russia?

To put it bluntly, is Armenia geostrategically valuable enough for the EU and the West to open up another front against Moscow in the post-Soviet space and to potentially confront Baku, Ankara and Tehran in addition?

If not, the strategic logic of the European and generally Western commitment in the region should be reconsidered. It should be clear that the autocratic axis of Moscow, Baku, Tehran and Ankara is seeking to block Western liberal values and actors in the region instead of cooperating constructively with them to make peace and integrate Western-oriented Armenia. It should also be clear that whenever autocratic regimes perceive any threats to themselves (especially to their own stability), they tend to take it out on civilian populations, be it their own or those of their antagonists. All four actors have been strongly critical of the presence of “foreign powers” in Armenia. Accordingly, the West should

take into account the realistic consequences of its actions for Armenia’s sovereignty, territorial integrity and the security of its civilian population, and hence demonstrate normative-political (as well as military) restraint. While this would not necessarily guarantee the protection of Armenia, it would give Yerevan an opportunity for political de-escalation and rapprochement, that is, normative adaptation to regional realities by implication. There is plenty of evidence in the post-Soviet region of the fate of countries in which the EU pursues good political intentions and generates the willingness for political transformation but then ultimately fails to provide sufficient material resources to support it.

If, however, the EU is aiming to establish itself as an independent geostrategic actor in Armenia and in the South Caucasus as a whole in order to ensure the genuine protection of the country against aggression and to develop a connectivity infrastructure towards Europe, it must significantly and quickly increase its support for the country in terms of both quantity and quality. If Brussels wants to operate effectively in an antagonistic environment, it should create credible military and economic incentives for the region’s autocrats to respect Armenia’s sovereignty and territorial integrity and to integrate the country into regional formats, irrespective of Yerevan’s normative orientation. Such incentives, which are ultimately means of coercion, should be accompanied by clear, more courageous communication and more efficient coordination of the EU’s own instruments: Brussels, Washington, Paris, Berlin and NATO should be able to speak with one voice when it comes to the South Caucasus. They should also pursue cooperation formats with non-Western actors, particularly China, which benefit both sides, as the EU is already trying to do in Central Asia. The joint development of infrastructure projects seems particularly suitable in this respect.

Last but not least, the West should always keep in mind the geography of the region: isolating and punishing the region’s “rogues” is no help to Armenia – trying to help Yerevan finding a *modus vivendi* in accordance with regional realities is. To make this possible would admittedly be extremely challenging but also geostrategically valuable, considering the interest of Western capitals in a changing world.

## IMPRINT

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