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Walking the Geopolitical Tightrope Armenia's Changing Relationship With Russia

This paper analyses the changing relationship between Armenia and Russia in general diplomacy, economics and trade, defence and security and societal attitudes. It argues that while Armenia's disappointment in Russia is deepfelt and the effort to distance from it genuine, the long-standing dependencies on Russia in terms of energy, economics and trade, coupled with Armenia's geographic isolation, make it difficult for Yerevan to make zero-sum geopolitical "either – or" choices. Thus, changes in Armenia's approach to its relationship with Russia are based not on exchanging one global power (Russia) for another (the West), but rather on a diversification policy, with a significant but not exclusive role reserved for the US and EU. Nevertheless, the interests of both Armenia and the EU are aligned on diminishing Armenian dependence on Russia as well as deepening Armenia's democratic development. Many challenges and difficulties will have to be faced, however, first and foremost related to Armenia's geographical isolation, before the country's bid to overcome its dependence on Russia can be deemed a success.

Introduction

Russia's full-scale invasion of Ukraine in 2022 has had far-reaching consequences well beyond the immediate conflict. One such consequence is the decline of Russia's regional power and influence, as well as a modification in its bilateral relations, including with countries it traditionally considered as allies. This paper analyses the evolving relationship between Russia and Armenia and explores what these changes mean for both bilateral ties and the EU's role in the region.

Armenia's shift away from Russia began well before Russia's full-scale invasion of Ukraine. While some simmering frustrations were already present, relations began to sour more significantly after Armenia's 2018

Velvet Revolution.¹ Although the revolution had no explicit geopolitical aim and was not anti-Russian, its focus on rule of law, democratic reforms, government accountability, and anti-corruption clashed with the Russian model, soon causing friction between Moscow and Yerevan. The post-2018 government's more transparent communication style, including publicly voiced grievances – unlike previous administrations' inclination to discuss them behind closed doors – further irritated Moscow.

1 For more on some of the pre-2018 frustrations and the geopolitical context of the Velvet Revolution, see Richard Giragosian, [Paradox of power: Russia, Armenia, and Europe after the Velvet Revolution](#), European Council on Foreign Relations, August 7, 2019.

The major cracks, however, came following the 2020 Nagorno-Karabakh war and especially the 2021-2022 Azerbaijani incursions and occupation of territory within Armenia proper, solidifying after Azerbaijan's final takeover of Nagorno-Karabakh in 2023.² With Russia's failure to defend neither the Armenians of Nagorno-Karabakh, nor Armenia itself, despite corresponding security commitments, the seeds of disillusionment were sown, and faith in Russia plummeted.

Thus began Armenia's search for alternative partnerships and alliances, including a push for closer ties with the West, political distancing from Moscow and an active effort at diminishing Armenia's dependencies on Russia. While this process was not directly triggered by Russia's full-scale invasion of Ukraine, that war still had an impact, by drawing away Russia's attention and resources, thus creating the space for Armenia to not only consider geopolitical alternatives but also actively pursue them.

This paper considers four aspects of the Armenian-Russian relationship: political-diplomatic, security and defence, trade and economy and societal. The analysis is based on interviews conducted in Armenia with independent experts, representatives of the government, political circles and the foreign diplomatic corps, as well as a focus group with young Armenian professionals, complimented with literature research. The paper concludes with recommendations for European and Dutch policy makers.³

1. Political course and diplomatic relations

Armenia's current foreign policy strategy is that of diversification, with Europe and the US as one of its important directions, that attempts to overturn the previous, overwhelming focus on Russia. This shift does not imply a complete break with Moscow – diplomatic relations and high-level political contacts continue, and Armenia remains dependent on Russian trade and energy.⁴ However, the tone of the relationship has changed significantly. Once seen as the primary ally and security guarantor, Russia is now increasingly viewed in Armenia as a threat and a constraint on Armenian sovereignty.⁵

As part of its diversification policy, the Armenian government has undertaken concrete steps to distance itself from Moscow that would have been unthinkable just a few years earlier. In early 2024 Yerevan “froze” its membership in the Russian-led Collective Security Treaty Organisation (CSTO), signalling a departure from its traditional alignment. Simultaneously, Armenia is strengthening its ties with the EU and US. It has expressed a wish for EU-accession during an ongoing Russia-EU standoff, and in January 2025 signed a Charter on Strategic Partnership with the US that includes cooperation in the fields of economy, security and defence, and democratic development.⁶ Armenia's voting patterns in the UN have shifted as well, moving from consistent support for Russia to abstentions, and, in some cases, votes against Moscow.⁷

2 For more, see International Crisis Group, [Averting a New War between Armenia and Azerbaijan](#), International Crisis Group, January 30, 2023.

3 The author would like to extend a special thanks to the Dutch embassy in Yerevan and the Regional Studies Center (RSC) – and its head Richard Giragosian personally – for facilitating insightful meetings and discussions that have been invaluable.

4 Eduard Arakelyan, Karena Avedissian, PhD, and Tigran Grigoryan, [Armenia's Structural Dependence on Russia: Trade, Energy, Security](#), Regional Center for Democracy and Security, October 14, 2024.

5 Shoghik Galstian, [Pashinian Calls Russian-Led Alliance Security Threat To Armenia](#), RFE/RL's Armenian Service, September 18, 2024.

6 Csongor Körömi, [Armenian parliament adopts law to launch EU membership process](#), Politico, March 26, 2025.

7 Hovhannes Nazaretyan, [What Armenia's UN Votes Tell Us About Its Foreign Policy](#), EVN Report, March 23, 2023; RFE/RL's Armenian Service, [Armenia Votes For UN Resolution Citing 'Russian Aggression'](#), RFE/RL's Armenian Service, April 17, 2025.

Despite these changes Armenia is acutely aware of its geographic and geopolitical limitations. As a landlocked country with two of its four borders closed, any idea of completely replacing Russia or effectively ignoring its presence in the region is considered utterly unrealistic and potentially dangerous.⁸ The result is a foreign policy resembling a tightrope balancing act between seeking new partnerships to reduce dependence on Russia, while maintaining necessary ties where no real alternatives yet exist. In line with this, after a period of demonstrative distancing and confrontational rhetoric towards Moscow in 2023-2024, in recent months Yerevan's stance has somewhat softened.⁹ While the diversification push remains in place and efforts to diminish dependencies on Russia continue, the rhetoric has been more subdued and there is an attempt at more pragmatism, possibly dictated by larger geopolitical developments.¹⁰

The Russian perspective

Russia's interest in Armenia has traditionally been defined by a broad agenda of retaining or strengthening a sphere of influence in its "near-abroad." The specific significance of a foothold in South Caucasus is further stipulated by its strategic importance as a connector between several regions and countries that loom large in Russia's foreign policy (Central Asia, Türkiye, Iran). For many years, Armenia remained Russia's only ally in South Caucasus. While Azerbaijan strengthened its ties with Türkiye and increased its autonomy, and Georgia looked

towards the West, Armenia hosted a Russian military base in high proximity to a NATO-member (Türkiye), committed to the Russian economic sphere and supported Moscow within international fora. The main thing Yerevan expected in return for its loyalty was security, and Russia's failure to provide it has shaken the foundations of their relationship.¹¹

In a general sense, over the last several years, Moscow's traditional dominance in the region has taken a hit. Russia lost the ability to exert influence over Yerevan and Baku through the Nagorno-Karabakh conflict, its leverage over Azerbaijan has all but evaporated and erstwhile ally Armenia is actively reaching out to other potential partners and looking to disentangle from Russian dependencies.¹² All the while Russia's capacity to respond to these challenges to its influence has been limited, at least for now, with resources and attention tied down by its war in Ukraine. Moscow may well be looking to reassert itself if – and as soon as – circumstances allow.

Implications for the EU

For Armenia, a dichotomous choice between Russia and the West is neither welcomed nor realistic under current conditions. While Yerevan's disappointment in Russia and the resulting push for independence from Moscow are sincere, there is a deepfelt understanding within government and expert circles that in terms of the Western direction, Armenia's geographical and geopolitical constraints form an obstacle that will not be easily or quickly overcome. Therefore, Armenian officials and experts broadly consider the diversification path the right one, even if some criticise the government's execution as too late, insufficiently effective, and lacking in strategy.¹³

8 Clingendael interviews.

9 One example is Prime Minister Nikol Pashinyan's attendance at the May 9, 2025 victory parade in Moscow. Interlocutors in Yerevan described it as a relatively low-cost way to appease President Putin on an issue important to him, gaining leeway for steps less welcome in the Kremlin.

10 These include the uncertainties in US-European and US-Russian relations, Russia's gains in Ukraine, Europe's focus on its own defence, the global rise of illiberal powers (including within Western democracies), and Georgia's shift toward a more Russia-friendly, illiberal model and away from the EU. These developments further isolate Armenia in the region and increase doubts about its continued presence on the European political agenda. Armenian experts also question whether the US Trump administration has any real interest in the country.

11 For more on the Russian view of South Caucasus see, for instance, Sergey Markedonov, [Russia In The South-Caucasus: A Changing Region In A Changing World](#), The Gorchakov Fund, Brief N.2, 2025.

12 Among other avenues, Russia was able to exert influence through its role as mediator in the Nagorno-Karabakh conflict, its formal military alliance with Armenia, and as an arms supplier to both parties of the conflict.

13 Clingendael interviews.

Nevertheless, the EU is considered an important partner, with whom relations should be deepened as much as possible. In fact, Armenia had made earlier attempts at deepening ties with the EU, for instance with a negotiated Association Agreement that was due to be signed in 2013, but which Yerevan eventually rejected under Russian pressure. As somewhat of a second chance, Armenia signed a Comprehensive and Enhanced Partnership Agreement (CEPA) with the EU in 2017, which entered into force in 2021. The agreement is geared towards enhancing cooperation in a number of fields, including economy, security and democratic development. Furthermore, in March 2025 the Armenian parliament passed a law calling for the initiation of an EU-membership application. As yet, it is unclear how the government sees this path, or how it purports to deal with the inherent incompatibilities of a potential EU-membership and the existing membership in the Eurasian Economic Union (EAEU). Nevertheless, although few experts expect rapid progress along the EU integration path, and some even question the long-term feasibility, the move does signal a general political direction. It also reflects an alignment between Armenia and the EU in terms of democratic values and a mutual interest in reducing Russia's influence.

In practical terms, Armenia seems to prioritise three areas within its relationship with the EU:¹⁴ implementation of the CEPA, visa liberalisation and continued assistance from the European Peace Facility (EPF).¹⁵ The latter, especially, is noteworthy, both as the first time Armenia received security assistance from the EU, as well as the EU's readiness to provide it to a country that remains a formal member of the Russia-led CSTO and still hosts a Russian military base. The process leading to visa liberalisation, in turn,

entails a number of benchmarks that can play a transformative role for Armenia, including in areas like the fight against corruption and fundamental rights. A separate sign of European involvement is the deployment of the monitors of the EU Mission to Armenia (EUMA) on the Armenian side of the border with Azerbaijan, discussed below.

2. Security and Defence

Security and defence dominate Armenia's government agenda and public discourse, with the main perceived threats emanating from Azerbaijan (military) and Russia (statehood, independence). Russia's failure to protect Armenia from Azerbaijani attacks, despite a long-standing military alliance, has deeply affected its perception in Armenia, and eroded trust in Moscow as an ally.

In February 2024 Prime Minister Nikol Pashinyan announced that Armenia had frozen its membership in the Russian-led CSTO. While CSTO rules do not recognise a "frozen" status, Armenia has effectively downgraded its participation, halting financial contributions, skipping military exercises and lowering its representation at CSTO summits. Yerevan stopped short of leaving the organisation altogether, reportedly following Western partners' unofficial advice against it.¹⁶ No reversal of this is expected, as at this stage the opinion in Armenian government and expert circles is that the formal membership has so far not constituted a serious impediment to forming other security and defence partnerships, and an official withdrawal could trigger serious Russian retaliation.

Russia has also proven unreliable in arms supplies throughout its war in Ukraine, and Armenia has undertaken a drastic reorientation towards other suppliers as part of its diversification of defence relationships.¹⁷ Russia's share in Armenia's total

14 Clingendael interviews.

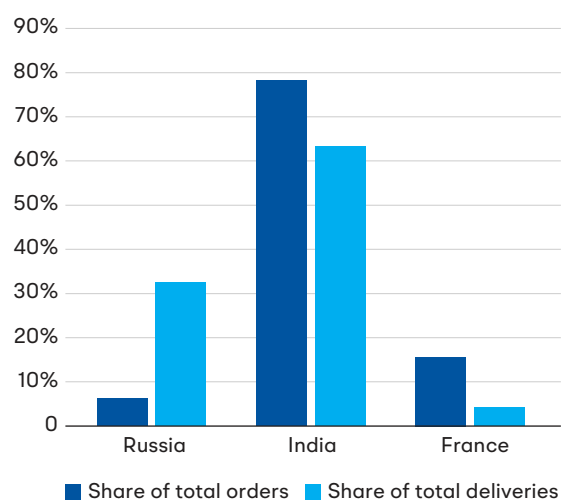
15 An EU-Armenia visa liberalisation dialogue was launched in September 2024 and the first ever EPF assistance package for Armenia was adopted in July 2024. Discussions are ongoing for 2025 (having been blocked in April 2025 by Hungary), and Armenia is said to be included as a beneficiary state in the preliminary EPF programs for 2026. ArmenPress, "[Armenia included in 2026 preliminary program as European Peace Facility beneficiary – Deputy FM](#)," Armenpress, June 5, 2025.

16 Wojciech Górecki, "[Armenia: a non-binding pledge to leave the CSTO](#)," Centre for Eastern Studies (OSW), June 13, 2024 and Clingendael interviews.

17 One major point of friction has been a 400mIn USD arms deal Armenia signed with Russia in August 2021, which Russia failed to deliver following the start of its full-scale invasion in Ukraine. Only part of the order has reportedly been delivered so far.

arms orders fell from 94% in 2011-2020 to below 10% by 2024.¹⁸ India and France have emerged as the main alternative arms suppliers (Fig. 1). The purchases from India include surface to air missile systems, multiple rocket launchers and artillery locating radars. Purchases from France include armored personnel carriers, CAESAR artillery systems and air-search radars.¹⁹

Figure 1 Armenia's arms imports 2020-2024



Source: SIPRI.

Another major part of the Armenian-Russian security relationship is the Russian military presence in Armenia, which consists of Russian border guards and a military base in the city of Gyumri, with an air base at Erebuni airport. In 2024, upon Armenia's request, Russia started gradually removing its border guards from sections of the Armenian border, beginning with the border with Azerbaijan, Yerevan's Zvartnots International Airport and the Armenian-Iranian border checkpoint. This process has continued into 2025, with the – not operational – Armenian-Turkish border checkpoint at Margara. Further withdrawals

of Russian border guards from the remaining sections of the border are said to be contingent on Armenian efforts to prepare the capacity to replace the remaining Russian guards.²⁰

The significance of the Russian military base is historically espoused not only by Russia's general wish for retaining a foot on the ground in the region, but also by its close proximity to the borders of a NATO-member, Türkiye. There is currently no talk of removing the base, with the lease agreement stretching to 2044, and an Armenian demand to withdraw it would likely be unacceptable for Russia.

Russian leverage

While a military alliance between Russia and Armenia on paper still remains, Russia's role in Armenia's security policy has drastically changed. Despite Yerevan's balancing act and pragmatism, its perception of Russia has gone from security guarantor to a threat, through Armenia's bilateral dependencies as well as through the CSTO, which, according to Prime Minister Pashinyan, "creates threats to Armenia's security, [its] continued existence, sovereignty and statehood."²¹ As such, Russia's leverage as a security provider has evaporated. However, while Moscow cannot be seriously expected to play a positive security role, it can still play a negative one. Should Armenia make any moves that cross Russian red lines – which may include the demand to withdraw the Russian military base or a formal withdrawal from the CSTO – Russia would likely retaliate. Some believe such retaliation could be in the military realm, e.g. through encouragement of and/or coordination with Azerbaijan, even if the Russo-Azerbaijani relationship has its ups and downs.²²

Furthermore, Armenian officials have accused Russia of waging a hybrid war against Armenia.²³

18 SIPRI database, [Sipri Arms Transfer](#), accessed June 12, 2025; Pieter D. Wezeman, Alexandra Kuimova and Jordan Smith, "Arms transfers to conflict zones: The case of Nagorno-Karabakh," Stockholm International Peace Research Institute, April 30, 2021; The Armenian Report, "Armenia-Russia Military Cooperation Drops from 96% to Below 10% Due to Unfulfilled Contracts," The Armenian Report, June 26, 2024.

19 SIPRI database, [Sipri Arms Transfer](#).

20 Clingendael interviews.

21 Shoghik Galstian, "Pashinian Calls Russian-Led Alliance Security Threat To Armenia", RFE/RL's Armenian Service, September 18, 2024.

22 Clingendael interviews.

23 Arshaluys Barseghyan, [Armenian parliamentary speaker says Russia is waging 'a hybrid war' against Armenia](#), OC Media, May 6, 2025.

This includes propaganda and disinformation targeting the current Armenian government, civil society organisations and Western presence in Armenia, as well as cyber-attacks by Russian hacker groups.²⁴ A recent report by The Insider cited the first instance of a pro-Kremlin bot-network targeting Prime Minister Pashinyan.²⁵

Implications for the EU

Armenia's distancing from Russia in terms of security does not mean the EU or US are expected to wholly replace it. Several factors push Armenia towards diversification and more self-reliance, as opposed to a downright pivot to the West. One is an apprehension about repeating the mistake of overreliance on a single partner. There is also the understanding that the EU or the US are unlikely to intervene militarily on Armenia's behalf in case of a conflict, given Armenia's limited strategic value and the EU's current focus on its own defence and other global and European developments. In this context the example of Georgia has become a cautionary tale, as pointed out by interlocutors in Yerevan in different contexts: despite Tbilisi's outspoken and exclusive focus on the West, it could not count on military support in its war against Russia in 2008.

Nevertheless, Armenia is set on closer cooperation with the EU and US, which can play an important role in terms of efficiency and modernisation of the Armenian armed forces, increasing overall resilience (including against hybrid threats), and providing alternative security and defence partnerships that would solidify Armenia's move away from Russia. Yerevan has been actively working on deepening military ties with NATO-countries, while the EU in July 2024

decided to provide Armenia with assistance from the European Peace Facility (EPF). Yerevan has held consultations with NATO-members in the framework of efforts to develop a new military doctrine, and in July 2025 it launched defence and security consultations with the EU. Furthermore, permanent military advisors from the US and France have been deployed at the Armenian Defence Ministry.²⁶ Notably, there has never been such an advisor from the Russian side.

Another highly valued format of Western involvement is the presence of the EU Mission in Armenia (EUMA) monitors along the Azerbaijani border. Armenian officials have called the mission a "factor of stability", and according to the head of the mission Markus Ritter the number of incidents along the border has diminished since its deployment.²⁷ However, both Azerbaijan and Russia have pushed for the removal of the mission, and the subject was included in the Armenian-Azerbaijani peace negotiations. Yerevan seems open to it, but continues to insist on first signing the peace treaty.²⁸

Upping Armenia's defence and resilience in turn provides the EU with a likeminded partner in South Caucasus, diminishes the risk of open conflict in the region by increasing deterrence against Azerbaijani ambitions as occasionally expressed by President Aliyev, and potentially weakens Russia's position in the region.²⁹

24 EuvsDisinfo, "DISINFO: Armenian NGOs create anti-Russian sentiments," EuvsDisinfo, October 12, 2023; Anna Pambukhchyan, "Russia and Azerbaijan take aim at EU's mission in Armenia," Euractiv, September 26, 2024; Cyberhub, "Russian Hacking Group Targets Armenia as Relations Sour Between Former Allies," Cyberhub, June 20, 2024.

25 The Insider, "Kremlin-backed Matryoshka bots attack Armenian PM Pashinyan, falsely accuse him of ignoring genocide, taking strong tranquilizers", The Insider, June 18, 2025.

26 Information centre on NATO in Armenia, "NATO-Armenia Relations," accessed June 17, 2025; JAMnews, "U.S. military representative will serve as an advisor in Armenia's Ministry of Defense," JAMnews, July 24, 2024; RFE/RL's Armenian Service, "Armenian, French Army Chiefs Meet In Germany," RFE/RL's Armenian Service, June 11, 2024.

27 News.am, "ԵՄ դիտորդական առաքելությունը դրականորեն փոխում է հայ հանրության ընկալումները ԵԱ-ի մասին. Ան քաղաղությանը," News.am, February 28, 2025; EU Neighbours East, "Head of EU Mission in Armenia: number of border incidents has significantly decreased," EU Neighbours East, April 7, 2025.

28 Arshaluys Barsegyan, "Armenia says after peace treaty ratification, they could 'discuss a new mandate' for the EUMA", OC Media, March 25, 2025.

29 Armine Martirosyan, "'Baku rewrites history and threatens Armenia' - on 'Western Azerbaijan' narrative," JAMnews, April 23, 2025.

Figure 2 Armenia's closed borders



3. Trade and economy

Despite Armenia's political and military distancing from Russia, bilateral trade has grown significantly since 2022.³⁰ With Western markets largely cut off, Russia has turned to its southern and eastern neighbours and Armenia is one of the countries to have benefitted, especially through re-exports (Fig. 3). Despite Yerevan's intent to reduce dependence on Russia, economy and energy remain the most challenging areas, due to geographic and geopolitical limitations in seeking other alternatives (Fig. 2).

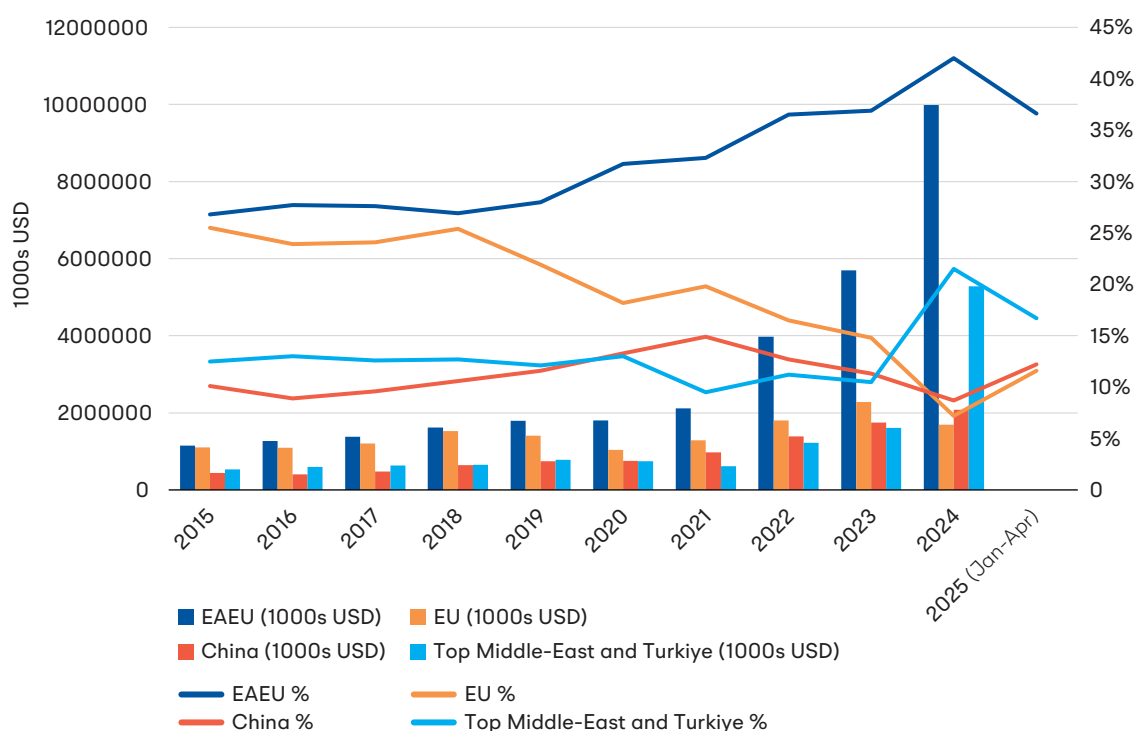
Western concerns have emerged that Russia uses countries like Armenia to circumvent Western sanctions. The Armenian government insists it complies with the sanctions, and that the surge in trade involves unsanctioned products whose producers decided to stop distribution in Russia (e.g. smartphones, washing machines etc.). In an effort to reassure Western partners Yerevan has reportedly invested in providing Armenia's foreign trade data in real time.^{31,32}

30 A peak in 2024 was related to temporary beneficial conditions for trade in precious metals.

31 Anna Pambukhchyan, "[Armenia's exports to Russia raise concerns over sanctions circumvention](#)," Euractiv, March 28, 2024.

32 A deeper analysis of sanctions and trade, though relevant, is beyond this paper's scope.

Figure 3 Armenia's Foreign Trade^{*,**}



Source: Statistical Committee of the Republic of Armenia.

* Top Middle-East and Türkiye includes the UAE, Iran and Iraq. Türkiye is included in the years 2015-2020.

In 2021 Armenia declared a temporary ban on Turkish imports, following Türkiye's involvement in the 2020 Nagorno-Karabakh war. The ban was lifted in January 2022.

** Although the overall trade numbers for 2025 are yet to be seen, according to data released by Armenia's Statistical Committee, the numbers for January-April 2025 show a sharp, 62% decline of trade with the EAEU from a factor 3 growth year-on-year in Jan-April 2024, and a 5% growth of trade with the EU from a 24% year-on-year decline in January-April 2024. Statistical Committee of the Republic of Armenia, [Socio-Economic Situation of RA, January-April 2024 \(Armenian, Russian\)](#) / Statistical Committee of the Republic of Armenia, [January-April 2024](#); Statistical Committee of the Republic of Armenia, [Socio-Economic Situation of RA, January-April 2025 \(Armenian, Russian\)](#) / Statistical Committee of the Republic of Armenia, [January-April 2025](#); Karina Melikyan, [Armenia's foreign trade with EAEU decreasing, while increasing with EU](#), Financial Portal ArmInfo, June 10, 2025.

Energy

Russia supplies most of Armenia's energy (Fig. 4 and 5).³³ There are plans for diversification that would reduce the share of Russian fossil fuels, including through a more extensive use of renewables, increasing energy efficiency, and

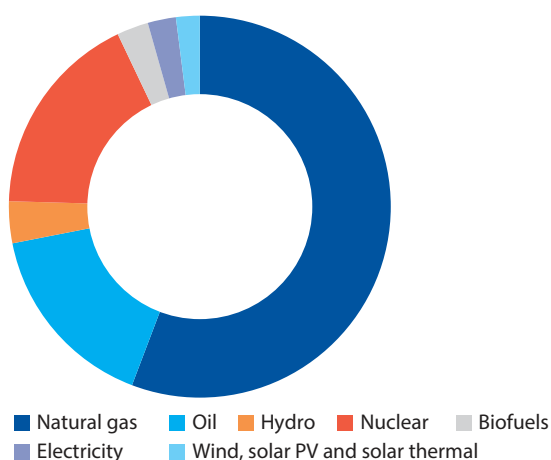
exploring other energy suppliers, but progress will take time and a major effort.^{34, 35}

33 Daniel Sosa, "[Armenia's energy sector: current developments and challenges](#)," German Economic Team, May-June, 2024.

34 One example of efforts to diversify suppliers pertains to negotiations taking place between Armenia and Turkmenistan for natural gas deliveries via Iran through a swap deal. Arshaluys Barseghyan, "[Armenia and Turkmenistan negotiate on gas deal via Iran](#)," OC media, March 27, 2025.

35 A 2024 report by the German Economic Team estimates the overall savings potential from improved energy efficiency at 24% of energy consumption in 2021. Daniel Sosa et al., "[Energy sector monitor Armenia 2024](#)," German Economic Team, June 2024.

Figure 4 Armenia's energy mix 2023



Source: Statistical Committee, Republic of Armenia, [Energy Balance of the Republic of Armenia, 2023](#). (Format of IEA).

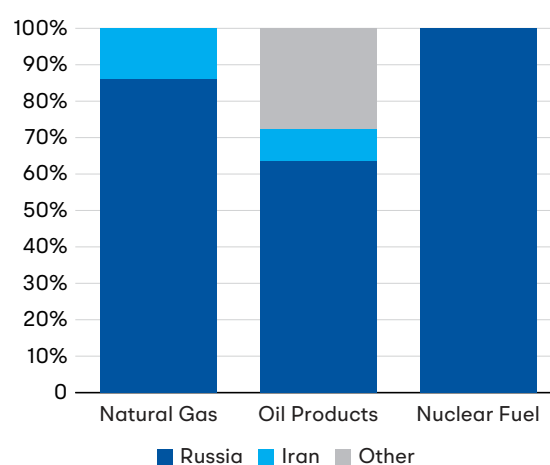
Nuclear energy offers another diversification path. Armenia's Metsamor Nuclear Power Plant (NPP) was built in the 1970s, and is run using Russian technology and nuclear fuel. It recently had its lifespan extended to 2036, with Russia's Rosatom managing the necessary renovations. Armenia has long had plans to build a new NPP, and a company to manage the project was established in March 2025. Russia, France, South Korea and the US are vying to provide the necessary technology, but the Armenian government has yet to choose among them.

Russian leverage

Armenia's bilateral trade boom with Russia is facilitated by the "golden cage" of the Eurasian Economic Union (EAEU) framework, of which both countries are a member. With its regulatory ease and comparatively straightforward logistics, it ensures both Armenia's economic growth and dependence on Russia, while blocking alternatives like a Deep and Comprehensive Free Trade Agreement (DCFTA) with the EU. According to experts, leaving the EAEU without (Western or other) alternatives in place would be economically disastrous.³⁶ Such a move could also potentially constitute a Russian

36 Clingendael interviews.

Figure 5 Fossil fuel imports, 2023



Source: Daniel Sosa, [Armenia's energy sector: current developments and challenges – German Economic Team](#), German Economic Team.

red line, the crossing of which could trigger Moscow's retaliation in an economic field.

Meanwhile, Russia's leverage on Armenia through economy and energy is substantial, and Moscow has a history of using such leverage for political ends. Some in Armenia speculate that Russia may already be applying such pressure, possibly via Georgia.³⁷ Yet, given the scale of Armenia's dependence, Moscow's restraint so far is notable. This may in part be due to Moscow's main focus on its war with Ukraine and larger conflict with the West. Once the active phase of the war in Ukraine ends, Armenia will probably face renewed pressure – whether from a victorious and emboldened Russia seeking dominance, or a weakened one clinging to influence. Additionally, current sanctions make Russia reliant on trade routes through countries like Armenia. If sanctions are lifted, this mutual dependency would end, and the relationship would revert to a more one-sided one. Another explanation for Moscow's restraint is that the Kremlin may see the negative turn in Armenian-Russian relations as a temporary setback. It is conceivable that Russia is simply

37 Eurasianet, ["Is Georgia doing Russia's dirty work to make Armenia pay?"](#) Eurasianet, May 27, 2025.

playing the waiting game, counting on Armenia's eventual return to the fold over a lack of viable alternatives and/or a disappointment with the West.³⁸

Implications for the EU

Whereas politically the EU is an important alternative for Armenia, the economics are more complicated. Armenia's only open borders are to the south (Iran) and the north (Georgia)³⁹ – neither ideal for large-scale trade with the West. Iran is under Western sanctions and transit via Georgia's mountainous roads and harbour is slow and expensive.

Opening the border with Türkiye could be a major game-changer for Armenia's international trade prospects. It would not only enable more direct trade with Türkiye where goods are now forced to circumvent the Armenian-Turkish border via Georgia, but also open up a logistically competitive trade route towards Europe, as well as offer possibilities for Armenia's inclusion in the Middle Corridor, a logistical route connecting Europe, Central Asia and China as an alternative to transit via Russia.⁴⁰ Türkiye closed its border with Armenia in 1993, out of solidarity with Azerbaijan during the first Nagorno-Karabakh war and attempts at normalising the Armenian-Turkish relations have not proven successful since. More recently, Armenian-Turkish talks have been positive, but Ankara has so far continued to insist on a signed peace treaty between Armenia and Azerbaijan before the Turkish border can be opened. Yerevan and Baku announced in March 2025 that negotiations on the peace treaty were concluded, but Azerbaijan has put forward

preconditions for its signing, the nature of which makes short-term progress unlikely.⁴¹

Legal and administrative hurdles also slow trade with the EU. The EU-Armenia Comprehensive Economic Partnership Agreement (CEPA), which entered into force in 2021, is not fully implemented, due in large part to challenges in Armenia's infrastructure and its public administrative capacity.⁴²

In terms of energy, for Europe the South Caucasus represents a transit route between Europe and Central Asia, that is alternative to Russia. However, Armenia is currently excluded from existing energy infrastructure projects. It is also excluded from the high voltage Black Sea Submarine Cable linking Azerbaijan, Georgia and Europe, which is to be completed in 2029. Although Armenia has expressed interest in joining the project and has a history of being a net electricity exporting country, its involvement is unlikely given the tensions with Azerbaijan.

4. Societal factors

Armenia's political distancing from Russia is more than a governmental shift: it reflects a broader societal sentiment and marks a significant departure from the past. For nearly three decades, Armenians viewed Russia as their key ally, particularly on security matters. However, Russia's failure to support Armenia(ns) during the 2020 and 2023 Nagorno-Karabakh wars or the 2021-2022 Azerbaijani incursions into Armenia proper, has drastically altered public attitude towards Russia, with the term "betrayal" used regularly in public discourse.

38 Interfax, [Затулин не видит альтернативы сотрудничеству Армении с Россией, хотя Ереван вправе искать поддержку в других странах мира](#), Interfax, May 30, 2024; News.ru, [Сколько у РФ военных баз, зачем они нужны и что будет с базой в Армении](#), News.ru, October 28, 2023.

39 An ongoing conflict with Azerbaijan to the East, and a closed border with Türkiye to the West.

40 For more see Niels Drost, Guilia Cretti and Babette van Giersbergen, [Central Asia Emerging From the Shadows](#), Clingendael, January 2025.

41 One precondition, for instance, is a demand to amend the Armenian constitution, a lengthy legal-administrative process and a controversial issue among Armenians, who would need to approve it via referendum.

42 Hugo von Essen and Jakob Hedenskog, ["Threading the needle: Boosting Armenia's resilience and deepening EU cooperation"](#), Stockholm Centre for Eastern European Studies, December 4, 2024.

Figure 6 Armenia's main enemy (top 3)

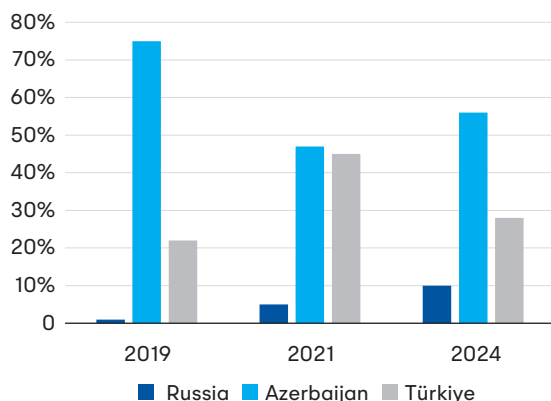
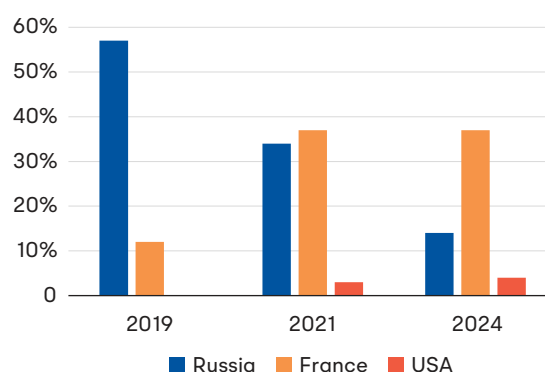


Figure 7 Armenia's main friend (top 3)



Source: Caucasus Barometer Datasets, [Datasets | Caucasusbarometer.org | Online Data Analysis](https://caucasusbarometer.org), accessed June 12, 2025.

Post-2020 polling shows that Russia has shifted in public perception from Armenia's main ally to one of its enemies (Fig. 6 and 7), be it as a distant third behind Azerbaijan and Türkiye, countries that have – directly or indirectly – been involved in a military conflict with Armenia.⁴³ France has replaced Russia as Armenia's perceived closest friend. The general perception of relations with Russia has become more negative, support for EAEU-membership has declined and trust in the CSTO is low (Fig. 8, 9, 10).

Still, disillusionment with Russia has not directly led to its replacement by the West as a similarly exclusive political, economic and security partner. An October 2024 poll shows the top-5 list of countries considered the most important for Armenia include Iran and India as well as France, the US and the EU.⁴⁴ This sentiment is in line with the already described general sense within the expert community and government, that it would be a mistake to tie Armenia's fate to a single external partner yet again, favouring diversification instead. At the same time, a

September 2024 poll showed a clear preference for a pro-Western foreign policy course (51% of respondents) over a pro-Russian course (26%) (Fig. 11).

Russian soft power

Russia's soft power potential in Armenia has weakened due to distrust and disappointment, and Moscow lacks credible political allies ahead of the June 2026 parliamentary elections. Currently, its only natural potential partners in the Armenian political field are the former elites, ousted from power in 2018, but they remain unpopular: a September 2024 poll showed former President Robert Kocharyan with just around 1% of public trust rating.⁴⁵ Nevertheless, the emergence of new figures, not necessarily from the political circles, that are aligned with the Russian interests cannot be excluded.

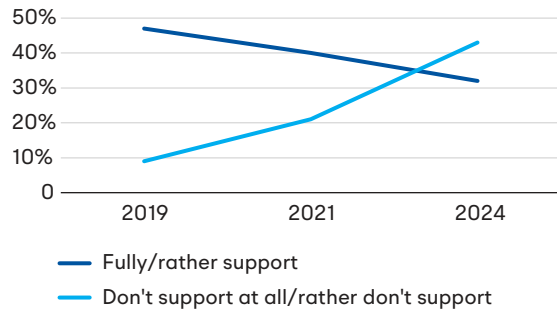
Moscow may be waking up to the changes in Armenian society. In late April sources within the Kremlin reported a renewed focus on Armenia, to be overseen by Presidential Administration

43 Haldun Yalçinkaya, [Turkey's Overlooked Role in the Second Nagorno-Karabakh War](#), German Marshall Fund, January 21, 2021.

44 Center for Insights in Survey Research, ["Public Opinion Survey: Residents of Armenia,"](#) International Republican Institute, data collected Sept 13-15, 2024; published October 18, 2024.

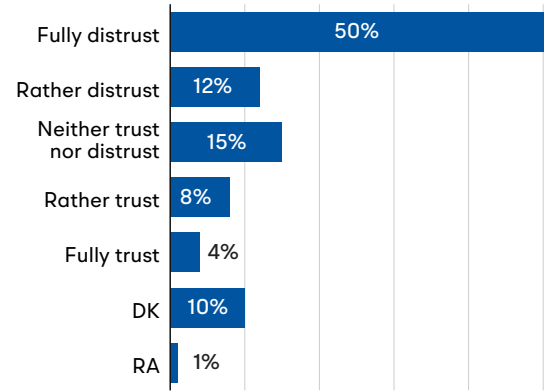
45 Center for Insights in Survey Research, ["Public Opinion Survey: Residents of Armenia,"](#) International Republican Institute, data collected Sept 13-15, 2024; published October 18, 2024.

Figure 8 Support for EAEU membership



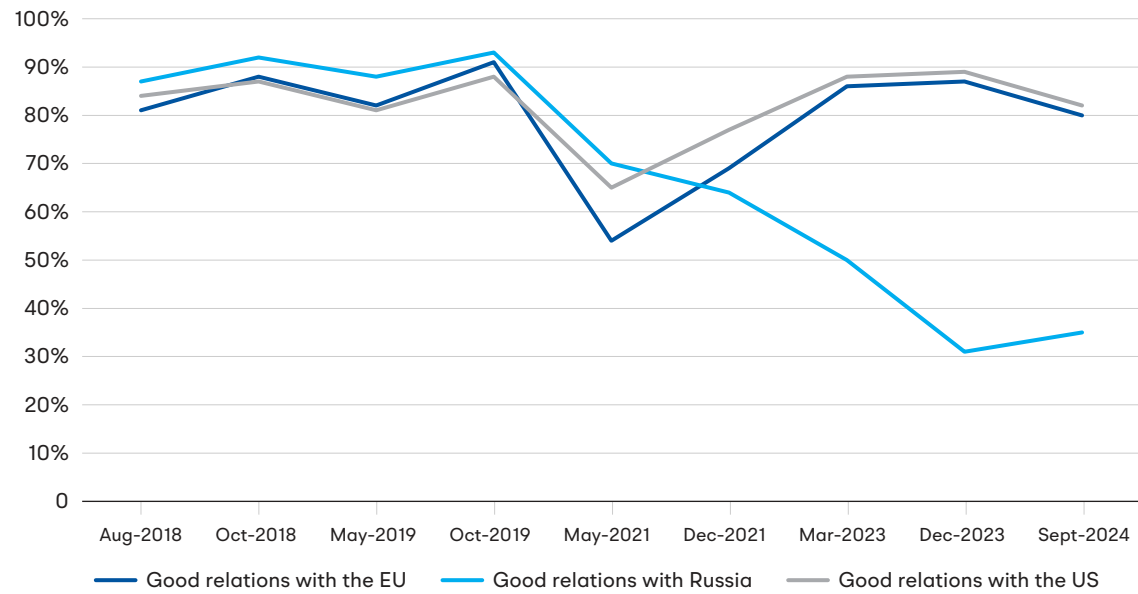
Source: Caucasus Barometer Datasets, [Datasets | Caucasusbarometer.org | Online Data Analysis](https://caucasusbarometer.org/online-data-analysis), accessed July 3, 2025.

Figure 9 Trust – Collective Security Treaty Organisation (CSTO) (%)



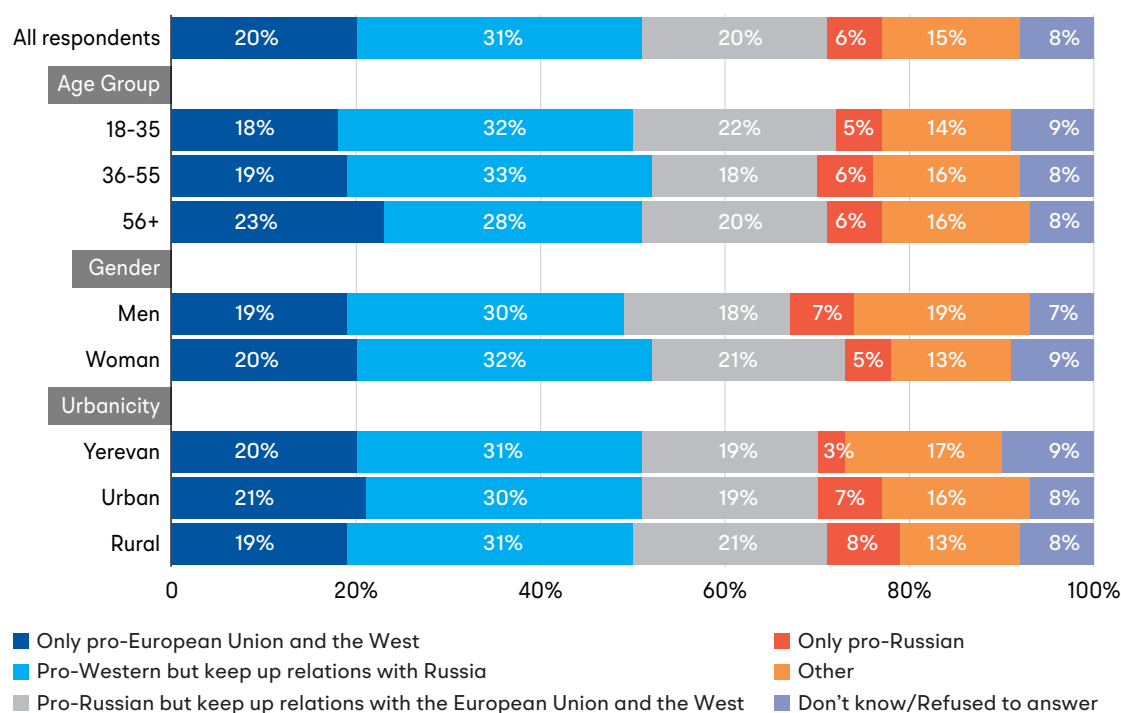
Source: Caucasus Barometer Datasets, [Datasets | Caucasusbarometer.org | Online Data Analysis](https://caucasusbarometer.org/online-data-analysis), accessed July 3, 2025.

Figure 10 Perception of Armenia’s foreign relations within Armenian society



Source: International Republican Institute (IRI) poll, October 2024.

Figure 11 What should our country’s foreign policy course be?



Source: International Republican Institute (IRI) poll, October 2024.

prominent Sergey Kyrienko.⁴⁶ That focus seems for now to be placed on propaganda, but more concrete efforts are expected as elections near. Experts doubt the effectiveness of such campaigns due to the public’s changed attitudes, although internal as well as external factors (e.g. the emergence of unexpected candidates, or the situation in Ukraine) may yet have an impact.⁴⁷ It is also conceivable that even if Russia does not manage to win back Armenian hearts and minds, it will at the very least try to reverse the country’s more Western outlook with targeted anti-Western propaganda, especially in the run-up to the 2026 parliamentary elections.

A clash unfolding at the time of this writing, between Armenia’s government and church, highlights the country’s internal power struggles

in conjunction with the (perceived) external influences. Relations between Prime Minister Pashinyan and the Armenian Apostolic Church have long been tense. The Church’s head, Catholicos Garegin, criticized Pashinyan after Armenia’s 2020 defeat in the Nagorno-Karabakh war, and has called for his resignation. In 2024, an archbishop, Bagrat, led the biggest anti-government protest of the past years. The church, in turn, has faced longstanding corruption allegations. In May 2025, tensions escalated when Pashinyan accused Garegin and other clerics of breaking celibacy vows and called for government involvement in appointing church leaders. The church accused him of undermining national unity. The standoff intensified with the arrests of Russian-Armenian billionaire Samvel Karapetyan – who pledged support for the church – and several clerics, including Bagrat, on coup-related charges. Karapetyan has Russian citizenship and owns the Tashir Group conglomerate, which also operates the Electricity Networks of Armenia (ENA), the main energy distributor in the country. Pashinyan

46 Elena Mukhametshina, “Куратором отношений с Арменией в администрации президента стал Сергей Кириенко,” *Vedosti*, April 30, 2025.

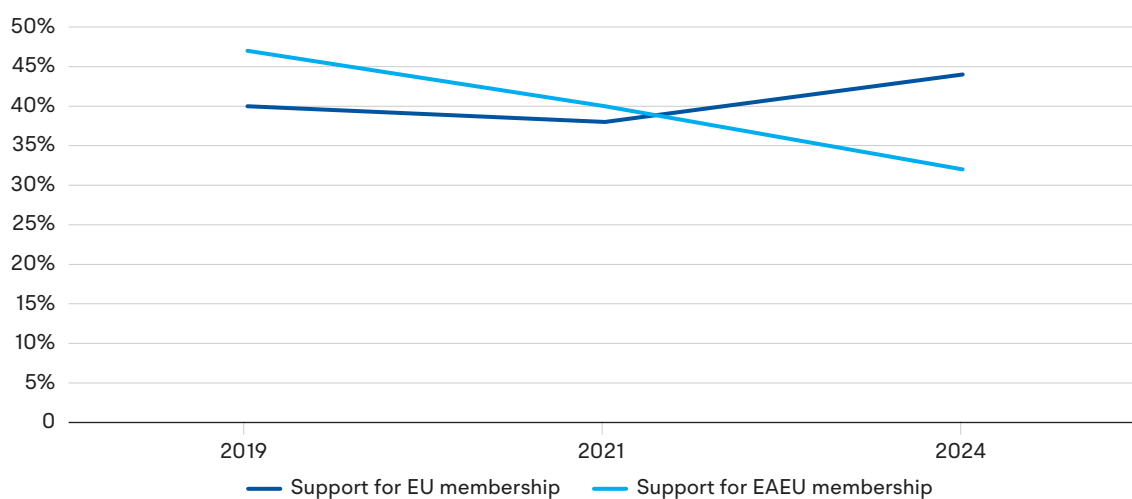
47 Clingendael interviews.

has since announced plans to nationalize ENA, accusing it of engineering energy crises to incite unrest.⁴⁸ Following reactions in Russian state media that strongly criticised the Armenian government’s actions and personally attacked Prime Minister Pashinyan, some Armenian officials – notably the speaker of parliament, Alen Simonyan – openly called for a discussion on banning Russian Television channels in Armenia.⁴⁹ The conflict has deepened political polarization, with government supporters citing church corruption and Russian ties, while critics view the government crackdown as a power grab. The episode also illustrates the tangled knot of internal political power dynamics, disagreements over the country’s political course, the spectre of Russian interests looming in the background, and the government’s goals of diminishing (energy) dependencies on Russia.

Implications for the EU

Armenian public perceptions reflect the overall trend in the country’s foreign relations: to the backdrop of a worsening relationship with Russia, Armenians see relations with the EU and US as positive or even improving (Fig. 10). Polling shows a stable or increased support for EU-membership – one October 2024 poll by the International Republican Institute (IRI) showed 58% support – in parallel to decreasing support for the EAEU (Fig. 12).⁵⁰ This trend suggests a clear opening for closer ties with the EU and US.

Figure 12 Support for international memberships⁵¹



Source: Caucasus Barometer Datasets, [Datasets | Caucasusbarometer.org | Online Data Analysis](https://caucasusbarometer.org), accessed June 12, 2025.

48 Arshaluys Mgdesyanyan, [Арест миллиардера в Армении: новый виток противостояния](#), Deutsche Welle, June 19, 2025.

49 Alexandra Kuenning, [Armenian Parliamentary Speaker Simonyan suggests possible ban of Russian TV broadcasts](#), OC Media, July 2, 2025.

50 EU Neighbours East, [Annual Survey 2024: Armenia](#), EU Neighbours East, November 1, 2024; Center for Insights in Survey Research, [“Public Opinion Survey: Residents of Armenia.”](#) International Republican Institute, data collected Sept 13-15, 2024; published October 18, 2024; Caucasus Barometer Datasets, [Datasets | Caucasusbarometer.org | Online Data Analysis](https://caucasusbarometer.org).

51 “Support” comprises responses of “fully support” and “rather support”. Caucasus Barometer Datasets, [Datasets | Caucasusbarometer.org | Online Data Analysis](https://caucasusbarometer.org), data collected July 27-October 10, 2024; accessed July 3, 2025.

Besides a political alternative, the EU's appeal also includes an element of an alignment of values – democracy, rule of law, a fight against corruption – expressed by the Armenian government and demanded by the Armenian public during the Velvet Revolution of 2018. Despite progress in terms of individual freedoms, however, reforms in the mentioned spheres have been limited.^{52, 53} Correspondingly, there is a great degree of disappointment among independent experts and the general public – especially among young urbanites – with the government's perceived lack of achievements, and a related concern over the fragility of democratic progress.⁵⁴ Some allegations of corruption and/or cronyism persist. Consequently, there is a fear of democratic backsliding as a result of various factors, which include external threats facing the country, the idea that that democracies may prove weaker in military conflicts against autocracies, the internal (perceived) threats of destabilisation, the way the government handles the inherent tension between security considerations and democratic freedoms, and the overall global trend of the rise of illiberal powers that is not conducive to democratic development. Should the EU's attention move away from Armenia, the danger of democratic backsliding would increase: as an important vector of Armenia's diversification policy, Europe has significant leverage and a role to play in keeping the country on the democratic track.

52 Armenia remains a “partly free” country in the [Freedom House index](#), comparable to countries like Ukraine and Moldova, but the progress has stagnated somewhat. It has made progress in [freedom of the media](#) and [corruption perception](#). Rule of law, however, remains a challenge. Freedom House, “[Armenia](#),” accessed June 17, 2025; Reporters Without Borders (RSF), “[Armenia](#),” accessed June 17, 2025; Transparency International, “[Corruption Perception Index](#),” accessed June 17, 2025.

53 Hugo von Essen and Jakob Hedenskog, [Threading the needle: Boosting Armenia's resilience and deepening EU cooperation](#), SCEEUS Report No. 17, Stockholm Center for Eastern European Studies (SCEEUS), December 4, 2024.

54 Clingendael interviews.

Conclusions

Considering the analysis described above, the following conclusions can be drawn.

Political/diplomatic

There is a broad consensus among the Armenian experts consulted for this study that **Armenia-Russia relations** will not return to pre-2020 levels. Russia is no longer seen as a reliable partner, especially in security, and is expected to always seek to limit Yerevan's options for self-reliance and independence, to keep Armenia within its sphere of influence.

Armenia's government has formulated and is actively pursuing a **diversification policy** that aims to reduce dependency on Russia in politics, economy and security. Key alternative partners include the EU, India, Iran, the Gulf states and, potentially, China. While the government has achieved certain results, especially in reorienting its arms imports as part of security diversification, it is too early to assess the overall effectiveness of this policy in most areas. Some local experts accuse the government of doing too little, too late.

Diversification does not mean replacing Russia with another single actor like **the EU**. While the Armenian government and larger society currently consider Russia to be something between an unreliable partner and a downright threat to Armenia's statehood, Russia remains a regional power Yerevan must navigate. This will include an effort to avoid potential red lines – a formal withdrawal from the CSTO or the EAEU, far-reaching military cooperation with NATO or an expressed wish to join the alliance, a close alignment with Ukraine etc. – that could trigger Russian retaliation or leave Armenia in an even more vulnerable state. In general, the interlocutors in Yerevan believed the EU and US to be important partners with whom ties should be deepened as much as possible, but not full substitutes for Russia's previous role.

In terms of **values**, there has been alignment between the EU and the current Armenian government ever since it came to power in

2018: democracy, individual freedoms and the fight against corruption are still on the government agenda and in its rhetoric, and Armenia has improved its record on freedoms. However, experts warn of the risks of democratic backsliding due to external and internal pressures in an increasingly illiberal global and regional environment.

Security and Defence

Despite the continuing existence of a military alliance with Russia on paper, the country is no longer seen as a reliable security partner, which has led Yerevan to **downgrade its security relationship with Moscow** and seek new partnerships elsewhere. This is likely to continue, although Armenia will probably tread cautiously to avoid provoking Russia.

Armenia has significantly reduced its arms dependency on Russia while India and France having emerged as the main suppliers and major security partners. Yerevan also seeks to deepen its defence and security **ties with (other) Western nations**. In this regard Armenia's needs are plentiful, from various types of equipment, to assistance in training and modernising its armed forces and defence structures. It is unclear how far (other) European countries are willing to go in this cooperation, with Europe itself in the middle of reappraising its defence capabilities and security architecture. It is also unclear whether, and how, Russia will react to Armenia's potential increase of arms imports from NATO-countries, especially if and when it is no longer distracted by the war in Ukraine.

Economy/trade

Geography and geopolitics pose a hard limit on Armenia's possibilities and options. As a landlocked country with only two of its borders open, viable trade routes are scarce. Opening the Turkish border could be transformative, but is not likely as long as Ankara links it to a peace treaty between Armenia and Azerbaijan, which, as of the time of this writing, has stalled due to Azerbaijani preconditions.

Armenia remains dependent on Russia in both the **economic and energy** spheres, due in large

part to geography and EAEU membership. Reducing this dependency will be slow and difficult, but is essential for greater Armenian independence.

In terms of trade diversification, the **CEPA agreement** that is in place with the EU offers possibilities, but is underutilized due to a number of challenges, including Armenia's geographic isolation and insufficiently developed infrastructure and administrative capacity.

Society and culture

Public perceptions of Russia in Armenia have changed quite dramatically, from trusted ally to a (potential) threat. Local experts believe this change is lasting, leaving Russia without the foundation necessary for building a support base in Armenia.

Nevertheless, Moscow is expected to attempt to influence **Armenia's June 2026 parliamentary elections** through propaganda, disinformation or other hybrid means, including enabling or facilitating challengers. For now, however, it lacks credible political allies capable of challenging the incumbent government, although the emergence of new public figures in this field cannot be excluded. Even in the absence of viable local political partners, however, Russia may try to simply weaken the incumbent government, or try to reverse the country's more Western outlook with targeted (anti-Western) propaganda.

Recommendations

Having reached the above conclusions, the following recommendations can be made to Dutch and European policy makers:

- **Recognise Armenia's geopolitical and geographical constraints.** For the coming years Yerevan will be forced to tread carefully and balance its foreign policy, as a wrong move at a wrong time risks fatal consequences to its security and statehood. At least until it gains greater independence from Russia, it will try to avoid making overly stark or dichotomous choices

between different global or regional players. Demanding such a choice from Yerevan would be counterproductive.

- **Support Armenia's diversification efforts.**

European and Armenian interests align in Yerevan's goal of reducing reliance on Russia. While the process will be difficult and gradual, Europe can assist in key areas, including:

- o **Economy & Trade:** Enhance EU-Armenia trade by identifying mutually beneficial sectors, support Armenian producers in meeting EU standards and regulations and help strengthen Armenia's public administration to better implement the CEPA agreement.
- o Reopening the Turkish-Armenian border would transform Armenia's trade options and regional connectivity. The EU should include this on its agenda with Türkiye and support Armenian-Turkish normalization efforts.
- o **Security:** The EU can play an important role in strengthening Armenia's resilience. Beyond the financial assistance from the EPF and direct arms supplies (mainly France) to strengthen its deterrence capabilities, support is needed in capacity-building for Armenia's armed forces and border guards. This would help Yerevan in its efforts to modernise its armed forces and replace Russian personnel on key borders.
- o The EUMA monitoring mission plays an important role in reducing tensions along the Armenian-Azerbaijani border. The mission should be continued, at the very least until Armenia and Azerbaijan sign a peace treaty, and possibilities of retaining some monitoring presence in Armenia even after that, perhaps in a different format, should be pursued. In addition, a deployment of monitors on the Azerbaijani side of the border should be explored, to further reduce the risk of escalation.
- o The EU should help Armenia increase its resilience from hybrid threats, especially in the run-up to the 2026 parliamentary elections, when a Russian push for

increasing its influence in the country can be expected.

- o **Energy:** Although Armenia lacks ready-made alternatives to the natural gas supplied by Russia, the EU can help the country boost energy efficiency and renewables, thus supporting its efforts to diminish dependence on Russian fossil fuels. Considering the significant role of nuclear energy in Armenia's energy mix, the EU should also enhance cooperation with Yerevan in the area of nuclear security and safety measures, supporting alternatives for the current aging nuclear reactor serviced by Russia.
 - o Inclusion in regional projects like the Black Sea Submarine Cable (or any other – present or future – regional energy infrastructure projects circumventing Russia) would be another way for Armenia to enter energy cooperation frameworks alternative to Russia. The EU should pursue such inclusion for Armenia through active diplomacy.
- **Manage expectations.** The EU must be transparent about what it can realistically offer. While Armenia's leadership and expert community are pragmatic, public expectations may exceed what the EU can deliver. Avoiding disillusionment is key.
 - **Safeguard democratic progress.** Armenia's democracy remains fragile and vulnerable to reversal, especially if Russia reasserts influence. At the same time there is a significant European soft power potential, which may be used effectively to achieve democratic progress in Armenia. EU support for reforms – particularly in rule of law – remains vital. The EU should continue and potentially enhance its support in strengthening Armenia's democratic institutions, including the parliament, the judiciary and the prosecutor's office, as well as the office of the Human Rights Ombudsman. This will not only deepen Armenia's democratic development, but also increase resilience in the face of (hybrid) threats. Incentives for strengthening Armenian democracy should be combined with conditionality to increase effectiveness.

About the Clingendael Institute

Clingendael – the Netherlands Institute of International Relations – is a leading think tank and academy on international affairs. Through our analyses, training and public debate we aim to inspire and equip governments, businesses, and civil society in order to contribute to a secure, sustainable and just world.

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